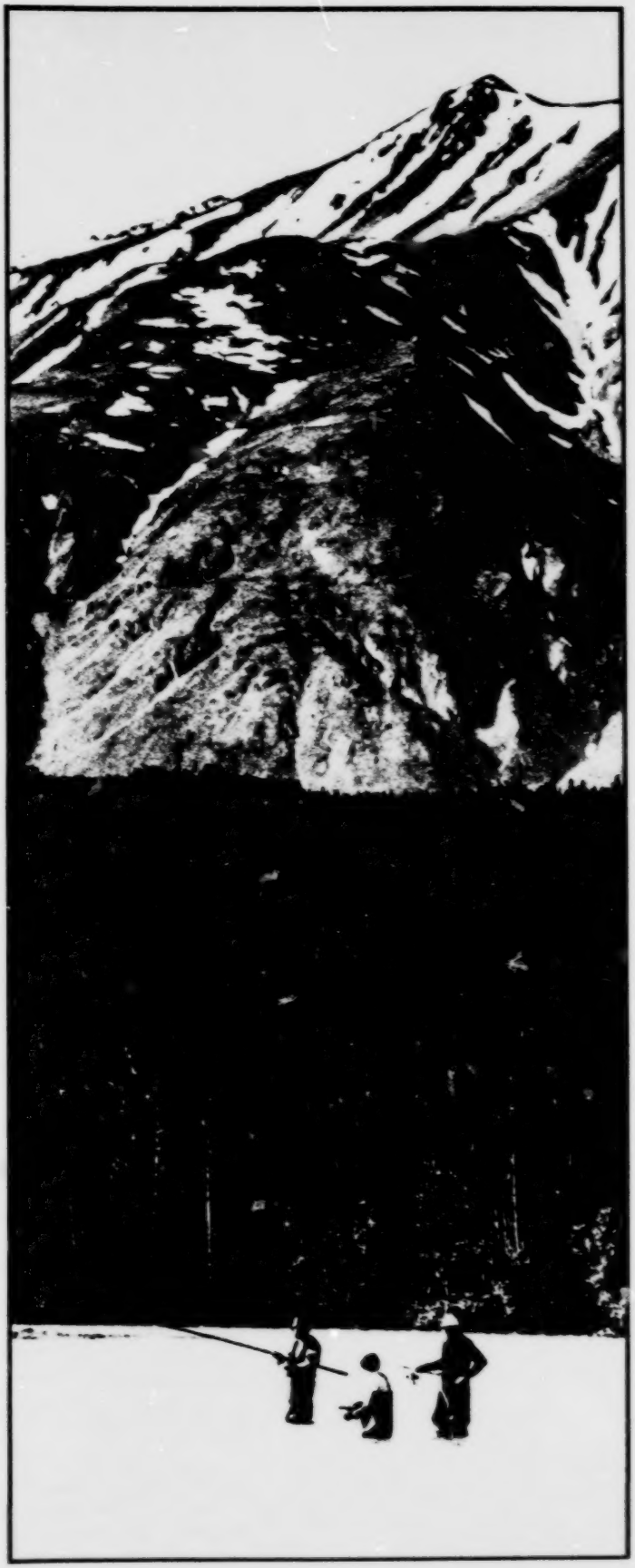

YUKON TOURISM INDUSTRY HIGHLIGHTS 1983

About the cover ...

Pictured are fishermen on the Tatshenshini River, located in the southwestern corner of Yukon. The Tatshenshini River is a major fishing area, where salmon, Dolly Varden and rainbow trout are available. Whitewater rafting and kayaking are also popular activities on this river and several tour companies offer guided and non-guided adventures of this type.

Promoters of tourism to Yukon have realized the value of wilderness adventure tours throughout Yukon and much effort has been channelled into the development and marketing of such wilderness experiences.

Development of the Tatshenshini River area is one example of the successful promotion of wilderness adventure tours in Yukon.

Cover photo courtesy of:
Government of Yukon
Department of Public Affairs

YUKON
TOURISM INDUSTRY
HIGHLIGHTS
1983

Yukon
Department of Tourism,
Recreation and Culture

March 1984
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YUKON TOURISM 1983
INDUSTRY HIGHLIGHTS

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FOREWARD

This is the 13th annual edition of the Tourism Industry Highlights report. The purpose of the report has always been to document changes within the industry and to present an extensive set of data to be used to outline trends and performance of Yukon tourism. As in 1982, tourism retained its temporary status as the Yukon's leading economic sector and proved to be growing significantly in this position.

This report is made possible with the active assistance and guidance of many firms and individuals who share in the tourism industry, including transportation companies, tour operators, accommodation establishments, tourist attractions, as well as government visitor information centres and staff of the Department of Tourism, Recreation and Culture. Report preparation was undertaken by Carla Stiles, Research Officer for the Tourism Planning and Development Branch. Clerical support and typing were provided by Glenda Badley and Ruth Warren. We acknowledge with thanks all contributions.

John Spicer
Director
Tourism Planning
and Development
Branch

MINISTER'S COMMENT

This 13th annual Industry Highlights report describes an excellent year for Yukon's tourism industry. As the leading economic sector in Yukon presently, record high numbers show that the impact of tourism is very significant.

To further develop the industry, several incentives programs were introduced and well received. New marketing techniques, including a series of television vignettes were produced to increase awareness of Yukon. With the combined efforts of all sectors to promote Yukon, 1984 promises to be another healthy year for tourism in Yukon.

Bea Firth (Mrs.)
Minister Responsible for
Tourism, Recreation
and Culture

EXECUTIVE SUMMARY

With the majority of Yukon's mines remaining closed in 1983, and with increased public and private sector support, the tourism industry has flourished as the leading sector in the Yukon economy.

Border crossings during the calendar year totalled 394,000, the highest number ever recorded, and an 8% increase over 1982. Highway travellers accounted for 86% of that total. Of this, 69% travelled by personal vehicle and 17% by motorcoach. Motorcoach traffic rose substantially, up 58% over 1982. The Skagway-Carcross one-day excursion contributed significantly to this increase. The highway total represents a 20% increase over 1982. Air traffic accounted for 14% of border crossings, (continuing its steady decline) down 17% from 1982.

New data was utilized for calculating visitor expenditure patterns during the year. Completion of a Visitor Exit Survey, undertaken during the summer of 1982, provided new data which enabled calculation of a tourist expenditure figure of $77 million. Although actual per capita expenditures probably remained near the same as 1982, the usage of new data account for the divergence of figures.

Visitor origin trends remained relatively stable in 1983. Visitors from the U.S. accounted for 61% of total summer visitors compared to 67% in 1982. Canadian origins rose significantly from 26% to 30% in 1983. Foreign-originating visitors increased their share slightly, from 8% to 9% this year. These figures closely resemble the visitor origin trends of 1981. Of the U.S. visitors, Alaska and the Pacific Region accounted for 40% of the total. Alberta and

British Columbia jointly represented 48% of Canadian-originating visitors, while Germany accounted for 43% of Yukon's overseas visitors.

In the accommodation sector of the tourism industry, there are a total of 80 fixed-roof establishments which offer 1,942 units. Nearly 80% of these establishments operate year-round.

The food and beverage sector presents 100 establishments serving prepared meals. Fifty-four of these serve alcoholic beverages with meals.

Visitation at tourist attractions, events and information centres showed mixed results again this year. Whitehorse facilities attracted a slightly higher number of visitors while Dawson City and Kluane attendance figures indicated small decreases.

Construction activity related to the tourism industry during 1983 was estimated at $3.4 million in value, down slightly from the $3.9 million of 1982. A substantial portion of this activity involved building/renovating recreation and accommodation facilities.

INDUSTRY HAPPENINGS

The Canada-Yukon Tourism Agreement (CYTA) officially ended on March 31, 1983. This three-year, $6 million dollar agreement was the first of its kind in the territory and resulted in a number of significant tourism development projects. Examples include development of new visitor reception/interpretive centres in Watson Lake, Dawson City and Carcross, and incentive grants awarded to many businesses to expand, improve or start new tourism enterprises. As CYTA ended on March 31st, the remainder of 1983/84 was used to wrap up and complete all unfinished projects, and disburse remaining financial incentive payments. A two-part evaluation was also undertaken to determine the effectiveness of CYTA. The evaluation concluded that the Agreement significantly contributed toward the objective of creating additional employment opportunities. The Accommodation Assistance Program and the Tourist Attraction Development program were most effective in creating employment and stimulating capital investment, thereby contributing toward the second major objective, which was to stabilize and diversify the economy. CYTA was also effective in establishing a foundation for a long-term tourism development program. A number of planning and marketing studies of the major destination areas and industry sectors were undertaken to identify tourism opportunities for future initiatives.

The Yukon Tourism and Small Business Incentives Program (TSBIP) was announced May 13, 1983. This program was intended to help bridge the gap in tourism development programming between CYTA, which ended, and the implementation of a new agreement.

The TSBIP, a $2.2 million fund, was designed to stimulate the creation and expansion of small business enterprises and other undertakings in service sectors. Under the TSBIP, two sub-programs were included — Business Incentives and Marketing Incentives. Marketing Incentives contained two separate components — Marketing Assistance for promoting specific types of travel into and within Yukon; and Tour Development for developing and marketing of new package tours. Sectors benefitting from the TSBIP included accommodation, wilderness/adventure travel, supply service and heritage projects. This program is due to expire on March 31, 1984.

The Tourism Facilities Improvement Program (TFIP) was announced in early fall 1983. This program provided financial assistance to tourism-related private businesses, municipalities and non profit organizations for exterior facade work and landscaping. Another objective was to create jobs in the off-season. Funds were disbursed to several businesses and organizations and were used to improve the aesthetic value of each facility. Examples include upgrading the exterior of a number of heritage buildings, service sector facade work, and landscaping projects.

The Tourism Planning and Development Branch continued its active program of preparing destination area plans for various regions and communities. The Kluane Region Tourism Plan, initiated in 1981, continued through 1982 with the release of a draft plan and was completed in the summer of 1983. A Tourism Development Plan for Dawson City, prepared by an independent consulting firm, was also completed in 1983. Similar planning exercises were underway in 1983 for the Southern Lakes/Carcross Area and Watson Lake. These plans are expected to reach completion in the 1984 season.

An Advertising Response Conversion Study, to assess the effectiveness of promotional material utilized by the Tourism Marketing Branch, was undertaken in 1983. While the 1980 and 1981 Conversion studies were conducted by an independent research firm, the 1982 and 1983 studies were done with in-house staff and computer facilities.

The Tourism Planning and Development Branch conducted a Visitor Exit Survey (under CYTA) during the summer of 1982. Exit surveys are an important data-gathering method for the tourism industry and provide the information needed to establish trend indicators. The last previous study of this type was conducted in 1978 (Northern Travel Survey). A Dempster Highway Survey was also conducted during the summer of 1982. Results of these surveys are anticipated in early 1984.

The White Pass and Yukon Route narrow gauge railway did not operate in 1983, due primarily to the closure of Cyprus Anvil Mine, which was responsible for much of the railway's freight traffic. Although the railway is recognized as a valued historic attraction, its closure seems to have had a minimal effect on tourist movement in the Yukon.

MARKETING ACTIVITIES

The five year Marketing Strategy developed by Tourism Yukon in November 1981 is being adhered to and implemented by means of Annual Marketing Plans.

In 1983, 80,000 inquiries for Yukon travel information were processed by the Tourism Marketing Branch and each was fulfilled by a copy of the Yukon Travel Guide, "Yukon - You're More Than Welcome". An additional 120,000 guides were distributed through automobile associations, travel agents, tour operators, Tourism Canada, hotels and travel information centres both within and outside of Yukon.

A total of 20,000 Yukon Travel Agent's Manuals were distributed in 1983. Through direct inquiries, (of which 10% were from Canada, 3% from overseas, and 87% from the U.S.) approximately 7000 manuals were distributed. The remainder of Travel Agent's Manuals were distributed through tour operators, airlines, Tourism Canada, trade shows and travel agent seminars.

Marketplaces for the travel agent, and other 1983 trade shows in which Tourism Yukon participated or was represented, include the following: in Canada - Toronto, Calgary, Edmonton, Vancouver; in the U.S. - Washington, California, Arizona, Texas, Florida, the Carolinas and New England states.

Tourism Yukon also participated in ITB in Berlin (the largest professional travel trade show in the world) and, through Canada West, was represented at trade seminars in Europe and southeast Asia.

Further steps were taken to develop the Japanese tourism market by sending a Tourism Yukon representative to meet with Japanese tour operators and media representatives, and by hosting visits to Yukon for Japanese writers and tour wholesalers.

Consumer travel shows in San Francisco, Toronto, Vancouver, Seattle, Minneapolis and Milwaukee generated 14,751 inquiries and a further 2,483 inquiries resulted from the "Arizona Charlie Meadows" promotional tour of California and Arizona.

The joint advertising program with the State of Alaska continued through the winter of 1982/83 and generated almost 28,000 responses to the Yukon advertisement in the "Alaska Travel Directory". A further 19,000 inquiries were the result of joint advertising in Reader's Digest, McLean's and Time (Canadian) magazines.

To further promote travel to Yukon, 135 travel influencers were invited to the Territory in 1983. Of these, 2 were tour operators, 70 were travel agents and 63 were writers and film crews from such diverse locations as Austria, Germany, France, Holland, the U.K., Japan, and Australia, as well as from Canada and the U.S. Voluminous magazine copy, at least two films, two Yukon travel guides and one book resulted or will result from these visits.

In 1983, work on a travel film describing Yukon travel and tourism was initiated. Production was curtailed due to weather conditons, but the film is expected to be completed in 1984.

In December 1983, a series of eight, sixty-second vignettes were produced for television. These were produced to help create awareness of Yukon -- its beauty, history and the lifestyles of its people. By year end, the vignettes had been distributed to 52 television stations in Canada. In 1984, efforts will be made to distribute them to stations in the U.S. and overseas.

The Operators Assistance Program was initiated in 1983 to provide marketing assistance to Yukon based tourism operators. A total of $44,159 was disbursed during the year ($13,659 in fiscal year 82/83 and $30,500 in fiscal year 83/84) to a total of 16 applicants.

The Yukon Co-operative Tourism Marketing Committee continued as a co-ordinating and advisory agency for the marketing of Yukon tourism. Established in 1981 and composed of representatives from industry and government, the committee guided the joint marketing program with the State of Alaska, participation in consumer travel shows, travel events promotions and overseas marketing.

METHODOLOGY & SOURCES

The data presented in this statistical report are taken from various primary and secondary sources, as well as from research conducted within the Department of Tourism, Recreation and Culture.

Border crossing counts are extracted from Statistics Canada International Travel Reports, covering all modes of international traffic from Alaska, and entering Yukon at Beaver Creek, Dawson City, Pleasant Camp on the Haines Road and Fraser on the Klondike Highway.

Since Watson Lake on the Alaska Highway is not an international boundary, the number of persons who enter Yukon at this point are estimated on the basis of a 1972 traffic count conducted by the Department of Tourism, and on the basis of traffic variations at Beaver Creek, Yukon's second Alaska Highway entry point.

Border crossings figures from 1978 and more recent years are obtained from Statistics Canada International Travel figures. Prior to 1978, border crossing figures were derived from Canada Customs records. By using two sources to calculate border crossings, some minor inconsistencies and over-estimations have occurred in previously published material, and the percentage differences range from -2% to 4.5%.

Although this method of compilation and information gathering provides a relatively comprehensive picture of Yukon border crossings, at least three groups are unrepresented:

- auto travellers on the Alaska Highway entering Yukon at Watson Lake at any time other than the peak May-September season;
- domestic air charter passengers flying on airlines other than scheduled carriers;
- and domestic private aircraft travellers[1]

Before 1975, Gross Expenditure figures, as presented in Exhibit J are estimates based on projections from data collected during two visitor surveys in 1962 and 1966. From 1975 to 1977, figures are based on the Tourism Expenditures Model (TEM) Yukon; for 1978 and 1980 TEM figures have been used as the basis for projections. 1981 and 1982 Tourist Expenditure estimates are based in part on 1981 visitor expenditure data obtained through the 1981 Coupon Conversion Study sponsored by the Department of Tourism, Recreation and Culture. The 1982 Visitor Exit Survey was used as a basis for 1983 expenditure estimations.

Visitor origin figures throughout the report are based on visitor registrations at the five Departmental Reception Centres located in Watson Lake, Haines Junction, Beaver Creek, Dawson City and Carcross as well as the Whitehorse Visitor Reception Centre operated by the Chamber of Commerce.

Data on the make-up and characteristics of the accommodation sector of the Tourism Industry are derived from Tourism Yukon's "Travel Agent's Manual" published annually. The manual includes a comprehensive listing of Yukon accommodation establishments and offers the most complete data source available.

[1]Private aircraft travellers are the subject of a separate report published by the Department of Tourism and Economic Development in November, 1979.

TOURISM & TOURISTS

In the past, the tourism industry has been considered the Yukon's third largest employer, after mining and government, and the second largest private sector industry, after mining. With the recent downturn of mining in the Territory, the tourism industry has taken the unaccustomed role of leading private sector industry in terms of revenue generated for the Yukon economy. In total, in excess of 500 private and public sector businesses and enterprises derive significant to major portions of their revenue directly as a result of expenditures made by tourists.

By definition, tourism is the business of catering to the needs and wants of travellers. A tourist is a person who travels away from his/her area of residence and employment for purposes other than establishing a permanent residence, setting up a business enterprise, obtaining employment or as part of the person's employment.

In practice then, the tourism industry consists of those businesses which provide goods, facilities and services which are used by the traveller. Traditionally, the tourism industry is divided into six sectors:

- Transportation sector;
- Accommodation sector;
- Food and beverage sector;
- Events and attractions sector;
- Recreation, entertainment and miscellaneous services sector;

- Distribution channels, the businesses through which tourism products and services are distributed to the consumer, such as retail travel agents, tour wholesalers, and various reservations services.

By definition, a tourist is a person who uses some or all of these facilities and services while travelling. That person's motivation for travel might be recreation, sightseeing, conventions, business, scientific, visiting friends and relatives, or any other type of activities other than the exceptions noted earlier relating to a change of long term residence or the establishment of a business enterprise.

It is readily apparent that the vast majority of travellers in Yukon are tourists. Two main categories of tourists travel in Yukon — Yukon residents and non-resident visitors to the Territory. Both categories are important to the tourism industry. Visitors traditionally arrive during a relatively short season, which lasts about 110-120 days (in Yukon's major destination areas). Residents are more likely to travel during a longer season, with many taking advantage of outdoor related activities such as skiing, hunting and fishing. In terms of revenue generation, businesses derive most of their tourism income during the summer, but are often sustained over a longer season or throughout the balance of the year by smaller number of non-resident visitors and resident Yukoners travelling during the less busy seasons.

CHART #1

PROFILE OF YUKON TOURISM INDUSTRY
SAMPLE LISTING OF FACILITIES & SERVICES BENEFITTING FROM TOURISM

		Approx. #'s
TRANSPORTATION SECTOR	Air Carriers offering scheduled services:	3
	Air carriers offering charters but not scheduled service:	13
	Vehicle rental companies (cars/campers):	9
	Bus companies offering scheduled/charter services:	8
	Auto service stations:	50±
	Miscellaneous:	?
ACCOMMODATION SECTOR	Fixed roof accommodation establishments (hotels, motels, highway lodges):	80
	Commercially operated campgrounds:	27
	Government operated campgrounds:	50
	Miscellaneous:	?
FOOD & BEVERAGE SECTOR	Cafes, lounges & dining rooms associated with accommodation establishments:	125
	Cafes, restaurants & fast food outlets not associated with accommodation establishments:	24
	Government Liquor Stores/Commercial outlets:	50
	Grocery Stores:	17
	Miscellaneous:	?
EVENTS & ATTRACTIONS SECTOR	Events, including craft fairs, festivals, etc.:	45±
	Commercially operated attractions:	10
	Government operated attractions/ historic sites:	11+
	Government operated visitor information/ interpretation centres:	6
	Museums which charge admission:	4+
	Boat tours:	3
	Yukon artists and producers of handicrafts selling directly and through fairs, stores and co-ops:	248+
	Miscellaneous:	?
RECREATION ENTERTAINMENT AND MISCELLANEOUS SERVICES	Sporting goods/recreational equipment stores:	13
	Wilderness tour operators offering wilderness experience vactions, fishing lodge vacations, rentals of canoes, etc.:	58
	Big game outfitters:	20
	Live theatres, movie cinemas, games centres, bowling alleys, arenas, etc.:	8
	Camera/film retailers, laundromats, drug stores, etc.:	32±
	Miscellaneous:	?
DISTRIBUTION CHANNELS	Travel agencies:	5
	General tour operators/ground operators:	2+
	Visitor associations:	2+
	Miscellaneous:	?

SCHEMATIC DESCRIPTION OF

WHO IS A TOURIST IN YUKON

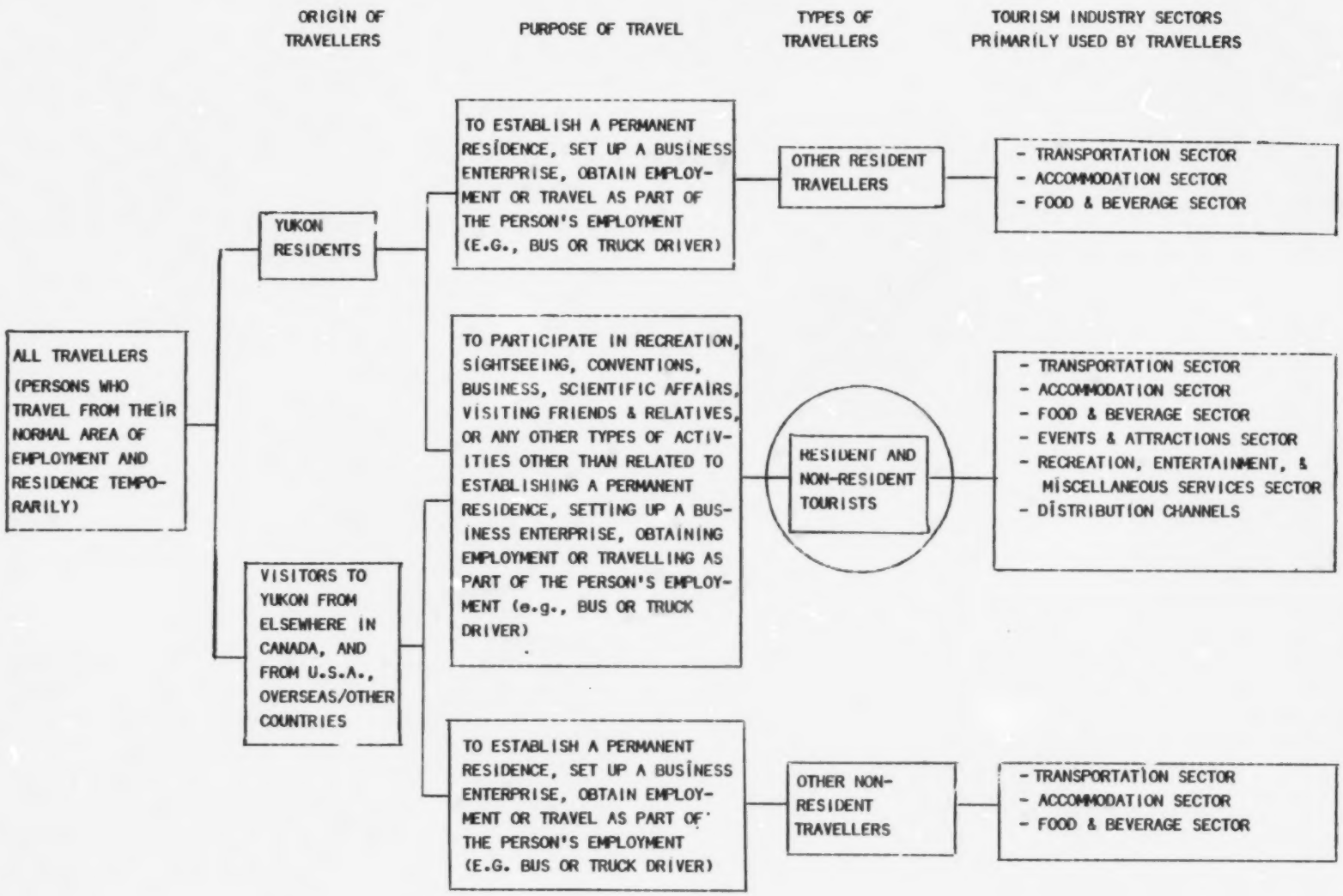

ORIGIN OF TRAVELLERS
PURPOSE OF TRAVEL
TYPES OF TRAVELLERS
TOURISM INDUSTRY SECTORS PRIMARILY USED BY TRAVELLERS
ALL TRAVELLERS (PERSONS WHO TRAVEL FROM THEIR NORMAL AREA OF EMPLOYMENT AND RESIDENCE TEMPORARILY)
YUKON RESIDENTS
VISITORS TO YUKON FROM ELSEWHERE IN CANADA, AND FROM U.S.A., OVERSEAS/OTHER COUNTRIES
TO ESTABLISH A PERMANENT RESIDENCE, SET UP A BUSINESS ENTERPRISE, OBTAIN EMPLOYMENT OR TRAVEL AS PART OF THE PERSON'S EMPLOYMENT (E.G., BUS OR TRUCK DRIVER)
TO PARTICIPATE IN RECREATION, SIGHTSEEING, CONVENTIONS, BUSINESS, SCIENTIFIC AFFAIRS, VISITING FRIENDS & RELATIVES, OR ANY OTHER TYPES OF ACTIVITIES OTHER THAN RELATED TO ESTABLISHING A PERMANENT RESIDENCE, SETTING UP A BUSINESS ENTERPRISE, OBTAINING EMPLOYMENT OR TRAVELLING AS PART OF THE PERSON'S EMPLOYMENT (e.g., BUS OR TRUCK DRIVER)
TO ESTABLISH A PERMANENT RESIDENCE, SET UP A BUSINESS ENTERPRISE, OBTAIN EMPLOYMENT OR TRAVEL AS PART OF THE PERSON'S EMPLOYMENT (E.G. BUS OR TRUCK DRIVER)
OTHER RESIDENT TRAVELLERS
RESIDENT AND NON-RESIDENT TOURISTS
OTHER NON-RESIDENT TRAVELLERS
- TRANSPORTATION SECTOR
- ACCOMMODATION SECTOR
- FOOD & BEVERAGE SECTOR
- TRANSPORTATION SECTOR
- ACCOMMODATION SECTOR
- FOOD & BEVERAGE SECTOR
- EVENTS & ATTRACTIONS SECTOR
- RECREATION, ENTERTAINMENT, & MISCELLANEOUS SERVICES SECTOR
- DISTRIBUTION CHANNELS
- TRANSPORTATION SECTOR
- ACCOMMODATION SECTOR
- FOOD & BEVERAGE SECTOR

CHART #2

MEASURING TOURISM ACTIVITY

Statistical measurement of all of this activity is done on an ongoing but piecemeal basis due to the high costs of obtaining comprehensive data. The number of resident and non-resident tourists travelling in Yukon or visiting any given community is not known precisely, nor is the total impact of the tourism industry on the Yukon economy known with a great degree of certainty. However, over the past twelve years a series of indicators have been developed to provide current measurements and trend data on the industry.

This report presents current data and trend analyses on a number of these indicators of tourism activity. Data on the number of persons entering Yukon is used to assess and predict changes in the numbers of Canadians and foreign visitors travelling into and within Yukon. At the regional and community level, data is included on the number of persons throughout the Territory, as an indicator of tourist movement in each area. Also at the regional level, measurements of the size and capacity of the accommodation sector are provided, since the ability of regions to accommodate visitors who are unable to camp or visit friends and relatives is directly related to the supply of fixed roof commercial accommodation. Finally, as an overall measurement of tourism activity in the Territory, estimates have been made of the economic contribution of visitors and travelling Yukoners to the Territorial economy through direct expenditures. These estimates are based on research conducted during the past five years into the characteristics and travel patterns of visitors to Yukon.

YUKON VISITOR VOLUMES

Three hundred ninety-four thousand trips were made across Yukon's various borders by visitors and Yukon residents entering Yukon during 1983. This represents an 8 per cent increase over 1982's total of 365 thousand, and is the greatest number of entries across Yukon's borders ever recorded in one year. Entries by highway account for 86 per cent of these 1983 border crossings, up 20% over 1982, underscoring the dominant role that tourists travelling by personal vehicle and motorcoach have in Yukon's tourism industry. Air travellers were the second most prevalent category of travellers entering Yukon, comprising 14 per cent of total traffic, continuing its downward slide from 18 per cent in 1982. Chart #3 portrays these findings graphically, to illustrate the trends in border crossings between 1975 and 1983.

Highway Border Crossings

Highway border crossing data provided by Statistics Canada distinguishes between returning Canadian residents and U.S. residents entering Canada from Alaska, and provides additional information on the numbers of such tourists travelling by personal vehicle and motorcoach. Beyond this, Statistics Canada have also determined the number of these people staying less than one day, and the numbers staying one night or more. Since travellers whose trips involve at least one night away from home most closely fit the description of a tourist, the following conclusions are drawn from Statistics Canada's highway border crossing data for these longer stay travellers:

- During the peak tourist season, June through September inclusive, the number of border crossings by Canadian and U.S. residents entering Yukon in personal vehicles as part of a trip lasting one night or more away from their country of residence showed an 18% increase over 1982, and accounted for 67 per cent of highway traffic (ie., motorcoach and personal vehicle traffic combined).

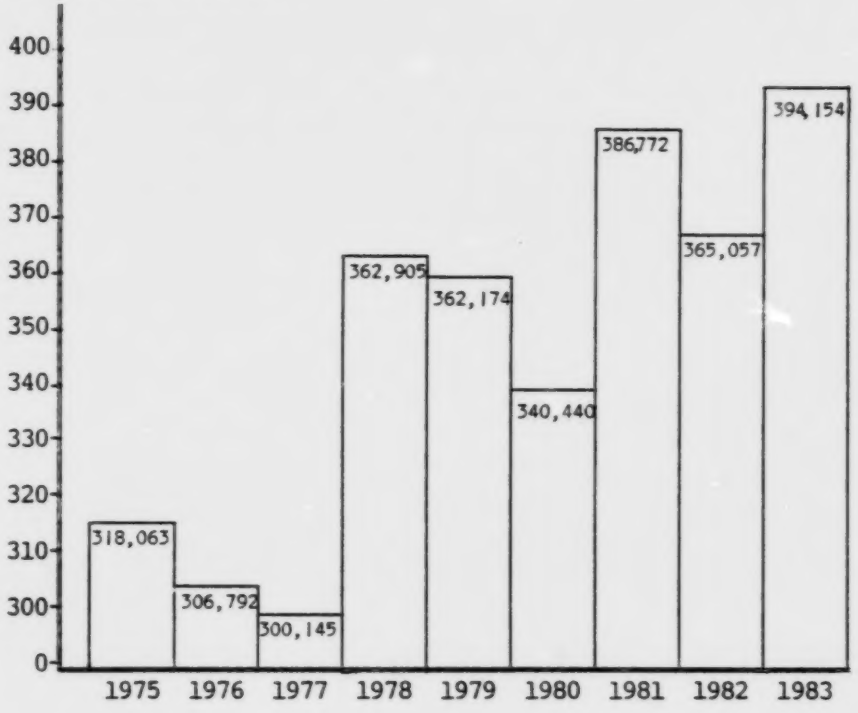
- During the same period, and for the same types of travellers, the actual number of persons entering Yukon by motorcoach greatly increased in 1983 showing a 60 per cent increase over 1982. Such motorcoach traffic constituted 33 per cent of highway traffic.

If nationality of these tourists is taken into consideration, U.S. residents accounted for 82 per cent of the personal vehicle traffic staying one night or more, and 87 per cent of the motorcoach passengers entering Yukon from Alaska in 1983 for a stay of one night or more.

Data on usage of highway transportation by visitors from Overseas and other countries is not available.

CHART #3

Number of visitors and returning Canadians entering Yukon, regardless of length of stay, annual totals & percent distribution by mode of transport, 1975-1983.



% by mode:

	1975	1976	1977	1978	1979	1980	1981	1982	1983
Personal vehicle	64%	60%	56%	63%	59%	57%	59%	66%	69%
Motor-coach	5%	5%	5%	4%	10%	11%	12%	11%	17%
Highway Total	69%	65%	61%	67%	69%	68%	71%	77%	86%
Air	19%	21%	23%	22%	22%	27%	24%	18%	14%
Rail & Other	12%	14%	16%	11%	9%	5%	5%	5%	-

Border Crossings by Other Modes of Transportation

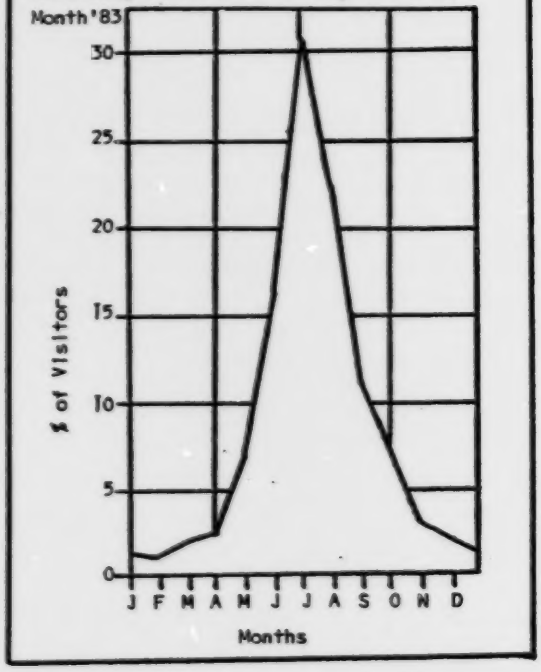
Air traffic, according to figures provided by Statistics Canada and various air carriers, continued to decrease in overall volume between 1982 and 1983, recording a 17% decrease.

Seasonality of Visitor Traffic Entering Yukon

Most Canadian tourist destination regions are blessed or plagued by dramatically cyclical patterns of tourist visitation each year. This is equally true for Yukon, as Chart #4 illustrates. This cyclical pattern of very high visitor volumes in summer - the peak season - preceded and followed by comparatively low visitor volumes between October and April - the low season - is known as seasonality.

CHART #4

Percent Distribution of Visitors and Returning Canadians Entering Yukon, by Month '83



Seasonality is a blessing to many tourism business operators who work 18 hours days from May to September, employing the sudden flood of students and transient labour which materializes during the warmer months. Once the season is over, many of these operators are able to shut down, and devote the colder months to upgrading their businesses, marketing their products to attract next year's visitors, and enjoying a well deserved rest or vacation. But seasonality can also be a plague. With visitor traffic peaking during the summer months, costly visitor facilities strain to meet the demand, and are then suddenly empty. Local residents on the one hand must compete with visitors to get into areas of common interest, such as fishing spots, restaurants, recreation areas, and favorite stores, and then, on the other hand, find many of these amenities closed or out-of-season once the tourists are gone. This is particularly true in smaller communities, such as Dawson, where most hotels, bars, restaurants and stores operate seasonally.

Tourism in Yukon will continue to be a seasonal industry in the foreseeable future. However, marketing of winter activities and attractions by industry and government alike will help to stabilize tourism traffic in key areas, reducing the strain on visitor facilities and providing multi-season employment for Yukoners as it becomes economically viable for more businesses to stay open to cater to this growing clientele, either local residents or tourists.

Detailed statistics concerning traffic volumes entering Yukon are included immediately following this section, as follows:

EXHIBIT A	Number of Canadian & U.S. Residents Entering Yukon from Alaska by Personal Vehicle or Motorcoach Grouped by Length of Stay during peak tourist season, June-September inclusive, 1983.
EXHIBIT B	Yukon Border Crossings 1983
EXHIBIT C	Yukon Border Crossings 1982
EXHIBIT D	Yukon Border Crossings 1981
EXHIBIT E	Yukon Border Crossings 1980
EXHIBIT F	Yukon Border Crossings 1979
EXHIBIT G	Yukon Border Crossings 1978
EXHIBIT H	Yukon Border Crossings 1977
EXHIBIT I	Yukon Border Crossings 1976

Exhibits B-I present detailed data on the number of persons entering Yukon across a border. This data is presented by mode of travel and border crossing point on a month by month basis from January 1976 to December 1983. Figures for Watson Lake are estimates. Figures for bus traffic in 1980 and thereafter include all traffic from Overseas and other countries entering Yukon by land.

Number of Canadian and U.S. Residents Entering Yukon from Alaska by Personal Vehicle or Motorcoach, Grouped by Length of Stay during Peak Tourist Season, June - September inclusive, 1983.

TYPE OF TRAFFIC ENTERING YUKON FROM ALASKA, BY BORDER CROSSING POINT	NUMBER OF PERSONS ENTERING YUKON FROM ALASKA									
	BY PERSONAL VEHICLE					BY MOTORCOACH				
	Canadian Residents	% of Total	US Residents	% of Total	Total Cdn & US Residents	Canadian Residents	% of Total	US Residents	% of Total	Total Cdn & US Residents
RETURNING SAME DAY[1]										
Beaver Creek	540		1,472		2,012	314		791		1,105
Dawson City[2]	937		281		1,218	41		1		42
Pleasant Camp[3]	644		10,217		10,861	27		632		659
Whitehorse[4]	7,832		3,221		11,053	1,095		8,766		9,861
All Ports of Entry: 1983	9,953	40	15,191	60	25,144	1,477	13	10,190	87	11,667
(1982)	(12,197)	(43)	(16,132)	(57)	(28,329)	(520)	(13)	(3,574)	(87)	(4,094)
STAYING IN YUKON ONE NIGHT OR MORE										
Beaver Creek	4,619		50,161		54,780	1,804		14,768		16,572
Dawson City[2]	1,736		7,976		9,712	351		1,063		1,414
Pleasant Camp[3]	3,458		3,843		7,301	54		620		674
Whitehorse[4]	5,706		10,501		16,207	3,363		20,795		24,158
All Ports of Entry: 1983	15,519	18	72,481	82	88,000	5,572	13	37,246	87	42,818
(1982)	(14,851)	(20)	(59,622)	(80)	(77,473)	(4,160)	(16)	(22,615)	(84)	(26,775)
TOTAL ENTERING YUKON REGARDLESS OF LENGTH OF STAY										
Beaver Creek	5,159		51,633		56,792	2,118		15,559		17,677
Dawson City[2]	2,673		8,257		10,930	392		1,064		1,456
Pleasant Camp[3]	4,102		14,060		18,162	81		1,252		1,333
Whitehorse[4]	13,538		13,722		27,260	4,458		29,561		34,019
All Ports of Entry: 1983	25,472	23	87,672	77	113,144	7,049	13	47,436	87	54,485
(1982)	(27,048)	(26)	(75,754)	(74)	(102,802)	(4,680)	(15)	(26,189)	(85)	(30,869)

Source: Based on border crossing data compiled by Statistics Canada.

Notes:

[1]Cdn traffic returning same day spends less than one day in US; US residents spend less than one day in Canada

[2]Via 60 Mile Highway

[3]Via Haines Road

[4]Via Carcross-Skagway Highway

EXHIBIT B

YUKON BORDER CROSSINGS 1983

PERSONS ENTERING YUKON - MONTH/MODE/PORT OF ENTRY

MONTH	Beaver Creek		Dawson		Pleasant Camp		Whitehorse		Watson Lake		Total Hwy.	Beaver Creek Air	Dawson Air	White-horse Air	Watson Lake Air	Total Air	White-horse Train	All Ports Other Method	Total of Train & Others	Total all Modes
	Auto	Bus	Auto	Bus	Auto	Bus	Auto	Bus	Auto	Bus										
January	1391	16	-	-	1013	-	-	-	N/A	N/A	2420	-	-	2877	600	3477	-	9		5906
February	1256	111	-	-	848	13	-	-	N/A	N/A	2228	1	-	2861	408	3270	-	3		5501
March	1976	111	-	-	1241	59	-	-	N/A	N/A	3387	9	48	3032	465	3554	-	6		6947
Q_1	4623	238	-	-	3102	72	-	-	N/A	N/A	8035	10	48	8770	1473	10301	-	18		18354
April	2890	129	-	-	2543	105	291	-	N/A	N/A	5958	11	26	3079	519	3635	-	21		9614
May	4815	454	248	58	2756	138	4032	786	11240	21	24548	28	26	3929	530	4513	-	102		29163
June	10369	5208	2373	339	4199	321	5682	4244	22099	386	55220	15	38	5798	611	6462	-	230		61912
Q_2	18074	5791	2621	397	9498	564	10005	5030	33339	407	85726	54	90	12806	1660	14610	-	353		100689
July	19783	7083	4226	1077	5848	635	9935	18507	42936	698	110728	23	229	7237	762	8251	-	466		119445
August	17637	5300	3560	763	5651	609	8009	8579	28864	585	79558	27	-	6158	820	7005	-	332		86895
September	9003	2640	771	221	2464	273	3634	4890	14629	169	38694	29	51	4527	633	5240	-	71		44005
Q_3	46423	15023	8557	2061	13963	1517	21578	31976	86429	1453	228980	79	280	17922	2215	20496	-	869		250345
October	4896	70	-	-	1798	28	818	80	N/A	N/A	7690	21	15	2767	379	3182	-	7		10879
November	2732	51	-	-	1062	4	-	-	N/A	N/A	3849	22	30	2536	466	3054	-	-		6903
December	2685	153	-	-	849	18	-	-	N/A	N/A	3705	9	6	2730	532	3277	-	2		6984
Q_4	10313	274	-	-	3709	50	818	80	N/A	N/A	15244	52	51	8033	1377	9513	-	9		24766
TOTAL	79433	21326	11178	2458	30272	2203	32401	37086	119768	1860	337985	195	469	47531	6725	54920	-	1249		394154

SOURCES: Transport Companies, Alaska Highway Traffic Count (1972 Adjusted), Stats Canada

YUKON BORDER CROSSINGS 1982

PERSONS ENTERING YUKON - MONTH/MODE/PORT OF ENTRY

MONTH	Beaver Creek		Dawson		Pleasant Camp		Whitehorse		Watson Lake		Total Hwy.	Beaver Creek	Dawson	Whitehorse	Watson Lake	Total Air	Whitehorse	All Ports	Total of Train & Others	Total all Modes
	Auto	Bus	Auto	Bus	Auto	Bus	Auto	Bus	Auto	Bus		Air	Air	Air	Air	Air	Train	Other Method		
January	1248	23	-	-	1247	1	-	2	N/A	N/A	2521	4	-	3797	908	4709	53	-	53	7283
February	1081	43	-	-	830	-	-	4	N/A	N/A	1958	1	12	3730	579	4322	69	4	73	6353
March	1895	106	10	-	1642	-	-	2	N/A	N/A	3655	3	44	5005	740	5792	82	3	85	9532
Q_1	4224	172	10	-	3719	1	-	8	N/A	N/A	8134	8	56	12532	2227	14823	204	7	211	23168
April	2327	160	-	-	2538	5	122	37	N/A	N/A	5189	15	12	3794	733	4554	135	16	151	9894
May	4397	534	149	12	3052	93	4564	720	9354	20	22895	21	31	4312	698	5062	414	110	524	28481
June	8928	4353	1811	458	4810	588	5660	2714	18391	372	48085	34	33	6361	989	7417	3298	233	3531	59033
Q_2	15652	5047	1960	470	10400	686	10346	3471	27745	392	76169	70	76	14467	2420	17033	3847	359	4206	97408
July	15605	6628	4082	1130	5865	722	9453	4183	35732	674	84074	10	181	9067	1067	10325	4718	467	5185	99584
August	14231	6192	3124	1066	6401	642	7658	3922	24021	566	67823	20	159	7757	1192	9128	4465	281	4746	81697
September	8187	2228	753	215	2706	163	3528	1930	12175	163	32048	10	83	4644	800	5537	1858	144	2002	39587
Q_3	38023	15048	7959	2411	14972	1527	20639	10035	71928	1403	183945	40	423	21468	3059	24990	11041	892	11933	220868
October	4529	134	-	-	1838	16	1101	82	N/A	N/A	7700	19	15	2970	536	3540	36	13	49	11289
November	2158	103	-	-	1193	19	-	-	N/A	N/A	3473	13	6	2115	535	2669	-	11	11	6153
December	2153	66	-	-	711	5	-	-	N/A	N/A	2935	8	2	2731	493	3234	-	2	2	6171
Q_4	8840	303	-	-	3742	40	1101	82	N/A	N/A	14108	40	23	7816	1564	9443	36	26	62	23613
TOTAL	66739	20570	9929	2881	32833	2254	32086	13596	99673	1795	282356	158	578	56283	9270	66289	15128	1284	16412	365057

SOURCES: Transport Companies, Alaska Highway Traffic Count (1972 Adjusted), Stats Canada

EXHIBIT C

YUKON BORDER CROSSINGS 1981

PERSONS ENTERING YUKON - MONTH/MODE/PORT OF ENTRY

MONTH	Beaver Creek		Dawson		Pleasant Camp		Whitehorse		Watson Lake		Total Hwy.	Beaver Creek Air	Dawson Air	Whitehorse Air	Watson Lake Air	Total Air	Whitehorse Train	All Ports Other Method	Total of Train & Others	Total all Modes
	Auto	Bus	Auto	Bus	Auto	Bus	Auto	Bus	Auto	Bus										
January	1031	60	-	-	958	1	-	-	N/A	N/A	2050	3	9	5284	920	6216	53	6	59	8325
February	909	17	-	-	900	2	-	-	N/A	N/A	1828	11	21	5298	723	6053	26	4	30	7911
March	1700	17	-	-	1466	1	-	2	N/A	N/A	3186	16	24	6184	1046	7270	10	8	18	10474
Q_1	3640	94	-	-	3324	4	-	2	N/A	N/A	7064	30	54	16766	2689	19539	89	18	107	26710
April	1634	157	-	-	2058	68	6	5	N/A	N/A	3928	15	20	5218	832	6085	93	25	118	10131
May	3202	646	407	19	2651	359	3951	268	8539	22	20064	12	74	6410	1295	7791	406	96	502	28357
June	7718	4263	2111	643	4921	296	5203	3924	16788	419	46286	11	104	8711	1484	10310	5329	222	5551	62147
Q_2	12554	5066	2518	662	9630	723	9160	4197	25327	441	70278	38	198	20339	3611	24186	5828	343	6171	100635
July	14877	7160	3696	978	6185	576	9621	5274	32617	759	81743	9	142	9975	1515	11641	4527	493	5020	98404
August	14556	7703	3807	1200	6947	662	8506	4511	21927	637	70456	36	228	11652	1606	13522	4616	514	5130	89108
September	7005	2687	939	190	2799	353	3491	2042	11114	184	30804	25	36	7327	1119	8507	1715	166	1881	41192
Q_3	36438	17550	8442	2368	15931	1591	21618	11827	65658	1580	183003	70	406	28954	4240	33670	10858	1173	12031	228704
October	3910	231	7	-	1911	11	1156	75	N/A	N/A	7301	1	45	5505	958	6509	135	93	228	14038
November	2172	131	-	-	1146	4	2	7	N/A	N/A	3462	14	7	4068	905	4994	21	3	24	8480
December	1950	128	-	-	818	2	7	1	N/A	N/A	2906	4	7	4318	899	5288	68	3	71	8205
Q_4	8032	490	7	-	3875	17	1165	83	N/A	N/A	13669	19	59	13891	2762	16731	224	99	323	30723
TOTAL	60664	23200	10967	3030	32760	2335	31943	16109	90985	2021	274014	157	717	79950	13302	94126	16999	1633	18632	386772

SOURCES: Transport Companies, Alaska Highway Traffic Count (1972 Adjusted), Stats Canada

EXHIBIT D

YUKON BORDER CROSSINGS 1980

PERSONS ENTERING YUKON - MONTH/MODE/PORT OF ENTRY

MONTH	Beaver Creek		Dawson		Pleasant Camp		Whitehorse		Watson Lake		Total Hwy.	Beaver Creek Air	Dawson Air	Whitehorse Air	Watson Lake Air	Total Air	Whitehorse Train	All Ports Other Method	Total of Train & Others	Total all Modes
	Auto	Bus	Auto	Bus	Auto	Bus	Auto	Bus	Auto	Bus										
January	945	1	-	-	685	-	2	2	N/A	N/A	1635	1	4	4599	986	5590	58	22	80	7305
February	830	2	-	-	813	1	-	5	N/A	N/A	1651	-	4	4999	833	5836	50	17	67	7554
March	1630	19	-	-	1028	1	1	5	N/A	N/A	2684	2	16	5755	1002	6775	84	29	113	9572
Q_1	3405	22	-	-	2526	2	3	12	N/A	N/A	5970	3	24	15353	2821	18201	192	68	260	24431
April	1897	65	-	-	1963	61	269	-	N/A	N/A	4255	17	11	4971	1082	6081	62	5	67	10403
May	3069	386	303	19	2570	43	2162	224	7763	15	16554	11	58	5791	1153	7013	663	82	745	24312
June	6165	3241	1558	1062	4365	491	4035	3622	15262	289	40090	13	203	8830	1340	10386	3149	162	3311	53787
Q_2	11131	3692	1861	1081	8898	595	6466	3846	23025	304	60899	41	272	19592	3575	23480	3874	249	4123	88502
July	10630	5498	3596	1154	5703	783	7119	4416	29652	523	69074	10	177	10848	1552	12587	4587	694	5281	86942
August	9755	4698	3271	1313	5561	814	7831	4257	19934	439	57873	34	259	10998	1560	12851	4561	813	5374	76098
September	5799	1712	298	266	2787	250	2795	2742	10104	127	26880	14	105	6492	1397	8008	2524	108	2632	37520
Q_3	26184	11908	7165	2733	14051	1847	17745	11415	59690	1089	153827	58	541	28338	4509	33446	11672	1615	13287	200560
October	3248	102	-	-	1827	65	329	128	N/A	N/A	5699	16	-	4505	966	5487	76	29	105	11291
November	2152	32	-	-	991	4	2	4	N/A	N/A	3185	4	26	4269	1018	5317	115	23	138	8640
December	1587	21	-	-	690	2	3	1	N/A	N/A	2304	1	-	3892	777	4670	38	4	42	7016
Q_4	6987	155	-	-	3508	71	334	133	N/A	N/A	11188	21	26	12666	2761	15474	229	56	285	26947
TOTAL	47,709	15775	9026	3814	28983	2515	24548	15406	82715	1393	231884	123	863	75949	13666	90601	15967	1988	17955	340440

SOURCES: Transport Companies, Alaska Highway Traffic Count (1972 Adjusted), Stats Canada

EXHIBIT E

EXHIBIT F

YUKON BORDER CROSSINGS 1979

PERSONS ENTERING YUKON - MONTH/MODE/PORT OF ENTRY

MONTH	Beaver Creek		Dawson		Pleasant Camp		Whitehorse		Watson Lake		Total Hwy.	Beaver Creek Air	Dawson Air	Whitehorse Air	Watson Lake Air	Total Air	Whitehorse Train	All Ports Other Method	Total of Train & Others	Total all Modes
	Auto	Bus	Auto	Bus	Auto	Bus	Auto	Bus	Auto	Bus										
January	2395	7	-	-	875	-	-	-	-	-	3277	13	4	4117	1008	5142	106	-	106	8525
February	1568	108	-	-	586	-	-	-	-	-	2262	1	9	3922	924	4856	102	-	102	7220
March	2734	77	-	-	1139	-	12	-	-	-	3962	-	37	5175	1124	6336	158	24	182	10480
Q_1	6697	192	-	-	2600	-	12	-	-	-	9501	14	50	13214	3056	16334	366	24	390	26225
April	2841	43	-	-	2485	-	19	-	-	-	5388	16	50	4812	1076	5954	231	3	234	11576
May	4577	451	310	19	2946	-	2661	385	7701	15	19065	26	31	5170	1134	6361	1261	74	1335	26761
June	10094	3094	3512	335	5239	118	4355	2999	15141	287	45174	17	153	7392	1502	9064	6727	255	6982	61220
Q_2	17512	3588	3822	354	10670	118	7035	3384	22842	302	69627	59	234	17374	3712	21379	8219	332	8551	99557
July	13076	5220	3998	103	4841	232	7100	4642	28417	519	69148	36	96	8460	1309	9901	9584	769	10353	89402
August	13318	4637	3635	189	4375	459	6995	4915	19776	436	58735	83	276	9055	1502	10916	7517	861	8378	78029
September	7411	2517	904	170	2505	40	3401	2631	10024	126	29729	45	56	5859	1292	7572	5171	158	5329	42310
Q_3	33805	12374	8537	462	11721	731	17496	12188	59217	1081	157612	164	428	23374	4103	28069	22272	1788	24060	209741
October	5238	40	-	-	1647	14	1062	92	-	-	8138	22	7	4141	966	5136	286	3	289	13563
November	1712	40	-	-	830	19	3	-	-	-	2604	7	5	1689	830	2531	92	12	104	5239
December	1323	6	-	-	734	-	6	-	-	-	2069	2	-	4806	912	5720	58	2	60	7849
Q_4	8318	86	-	-	3211	33	1071	92	-	-	12811	31	12	10636	2708	13387	436	17	453	26651
TOTAL	66332	16740	12359	816	28202	882	25614	15664	82059	1383	249551	268	724	64598	13579	79769	31293	2161	33454	362174

SOURCES: Transport Companies, Alaska Highway Traffic Count (1972 Adjusted), Stats Canada

YUKON BORDER CROSSINGS 1978

PERSONS ENTERING YUKON - MONTH/MODE/PORT OF ENTRY

MONTH	Beaver Creek		Dawson		Pleasant Camp		Whitehorse		Watson Lake		Total Hwy.	Beaver Creek Air	Dawson Air	Whitehorse Air	Watson Lake Air	Total Air	Whitehorse Train	All Ports Other Method	Total of Train & Others	Total all Modes
	Auto	Bus	Auto	Bus	Auto	Bus	Auto	Bus	Auto	Bus										
January	1276	8	-	-	1166	-	11	-	-	-	2461	7	23	3709	960	4699	107	-	107	7267
February	1411	11	-	-	1318	-	8	-	-	-	2748	-	14	3644	880	4538	187	3	190	7476
March	2198	53	-	-	1398	-	9	-	-	-	3658	4	60	4988	1070	6122	222	20	242	10022
Q_1	4885	72	-	-	3882	-	28	-	-	-	8867	11	97	12341	2910	15359	516	23	539	24765
April	3360	160	6	-	2257	3	19	-	-	-	5805	28	29	4276	1025	5358	289	-	289	11452
May	4306	49	429	24	4240	75	49	-	9061	18	18251	1	30	4903	1080	6014	1052	22	1074	25339
June	9962	2091	2308	339	5791	191	509	-	17814	338	39343	24	63	6971	1430	8488	5542	128	5670	53501
Q_2	17628	2300	2743	363	12288	269	577	-	26875	356	63399	53	122	16150	3535	19860	6883	150	7033	92092
July	14607	3300	5408	457	8473	395	974	-	34609	611	68834	31	189	8812	1247	10279	13028	285	13113	92226
August	17261	3044	4358	539	6426	434	756	-	23266	514	56598	11	200	11095	1430	12736	12026	222	12248	81582
September	10019	1464	992	191	3780	170	503	90	11794	149	29152	57	49	5568	1230	6904	6441	159	6600	42656
Q_3	41887	7808	10758	1187	18679	999	2233	90	69669	1274	154584	99	438	25475	3907	29919	31495	666	31961	216464
October	5942	256	-	-	2086	-	143	33	-	-	8460	24	-	3947	920	4891	263	10	273	13624
November	4619	10	-	-	968	-	111	-	-	-	5708	5	40	1884	790	2719	48	-	48	8475
December	2327	16	-	-	867	-	195	-	-	-	3405	-	5	4970	868	5843	37	-	37	9285
Q_4	12888	282	-	-	3921	-	449	33	-	-	17537	29	45	10801	2578	13453	348	10	358	31384
TOTAL	77288	10462	13501	1550	38770	1268	3287	123	96544	1630	244423	192	702	64767	12930	78591	39242	849	39891	362305

SOURCES: Transport Companies, Alaska Highway Traffic Count (1972 Adjusted), Stats Canada

EXHIBIT G

YUKON BORDER CROSSINGS 1977

PERSONS ENTERING, YUKON - MONTH/MODE/PORT OF ENTRY

MONTH	Beaver Creek		Dawson		Pleasant Camp		Whitehorse		Watson Lake		Total Hwy.	Beaver Creek Air	Dawson Air	Whitehorse Air	Watson Lake Air	Total Air	Whitehorse Ports Train	Whitehorse Ports Other Method	Total of Train & Others	Total all Modes
	Auto	Bus	Auto	Bus	Auto	Bus	Auto	Bus	Auto	Bus										
January	1490	36	-	-	1851	-	5	-	-	-	3382	10	5	3335	964	4314	87	23	110	7805
February	1482	67	-	-	1430	-	6	-	-	-	2985	-	18	3657	877	4552	172	16	188	7726
March	2292	307	15	-	1755	78	7	-	-	-	4454	8	23	3788	1004	4823	223	64	287	8906
Q_1	5264	410	15	-	5036	78	18	-	-	-	10821	18	46	10780	2845	13689	482	105	587	25097
April	2557	93	-	-	2361	17	11	-	-	-	5039	5	3	3826	944	4778	400	62	462	10279
May	3659	506	368	-	3291	95	92	-	7700	189	15898	4	12	4168	953	5137	2512	124	2636	23671
June	7211	2337	1589	417	3843	153	706	34	12895	378	29563	6	75	5295	1165	6541	8242	111	8353	44457
Q_2	13427	2936	1957	417	9495	263	809	34	20595	567	50500	15	90	13289	3062	16456	11154	297	11451	78407
July	13359	2040	4517	599	3397	187	679	-	31652	378	56808	11	397	7552	1202	9162	12481	254	12735	78705
August	9885	2239	3840	366	5689	273	714	40	9455	378	32879	10	410	6571	1321	8312	14070	186	14256	55447
September	5973	1860	116	36	2684	142	203	-	7031	189	18234	10	52	4945	1421	6438	9613	56	9669	34331
Q_3	29217	6139	8473	1001	11770	602	1596	40	48138	945	107921	31	859	19068	3944	23902	36164	496	36660	168483
October	4505	60	75	-	1761	77	17	-	-	-	6495	6	4	3964	1019	4993	534	11	545	12033
November	2846	25	-	-	783	7	6	-	-	-	3667	4	-	3221	765	3990	141	2	143	7800
December	2538	17	-	-	718	-	4	-	-	-	3277	4	12	3507	1400	4923	134	-	134	8334
Q_4	9889	102	75	-	3262	84	27	-	-	-	13435	14	16	10692	3184	13906	809	13	822	28167
TOTAL	57797	9587	10520	1418	29563	1027	2450	74	68733	1512	182601	78	1011	53829	13035	67953	48609	911	49520	300154

SOURCES: Transport Companies, Alaska Highway Traffic Count (1972 Adjusted), Stats Canada

EXHIBIT H

YUKON BORDER CROSSINGS 1976

PERSONS ENTERING YUKON - MONTH/MODE/PORT OF ENTRY

MONTH	Beaver Creek		Dawson		Pleasant Camp		Whitehorse		Watson Lake		Total Hwy.	Beaver Creek Air	Dawson Air	Whitehorse Air	Watson Lake Air	Total Air	Whitehorse Train	All Ports Other Method	Total of Train & Other	Total all Modes
	Auto	Bus	Auto	Bus	Auto	Bus	Auto	Bus	Auto	Bus										
January	1554	31	-	-	1152	-	20	-	115	-	2872	2	3	362	972	439	358	-	358	7369
February	1547	10	-	-	1761	-	6	-	92	-	3416	8	15	3354	747	4124	126	-	126	7666
March	2236	30	-	-	1712	1	13	-	101	-	4093	6	38	3337	951	4332	206	8	214	8639
Q_1	5337	71	-	-	4625	1	39	-	308	-	10381	16	56	9853	2670	12595	680	8	698	23674
April	2580	94	2	-	2456	70	13	-	187	-	5402	4	12	3847	843	4706	354	16	370	10478
May	4757	566	325	-	3181	176	71	-	5771	202	15049	13	20	4464	921	5418	2332	30	2362	22802
June	8692	1865	1600	266	4641	323	590	-	15668	404	34049	12	60	4399	684	5155	8425	95	8520	47670
Q_2	16029	2525	1927	266	10278	569	674	-	21626	606	54500	29	92	12710	2448	15279	11111	141	11252	80950
July	13844	3142	4273	305	6456	379	1024	-	27310	404	57137	9	152	7469	993	8623	12468	203	12671	78377
August	13412	2857	3916	379	5189	298	661	-	15758	404	42874	9	103	7351	1208	8671	11636	187	11823	63314
September	7957	1515	832	4	2795	7	225	-	5628	202	19165	0	-	4839	1242	6081	6455	16	6471	31690
Q_3	35213	7514	9021	688	14440	684	1910	-	48696	808	118974	18	255	19659	3443	23375	30559	406	30965	173381
October	4808	67	138	-	2149	5	43	28	155	-	7393	6	13	3023	1081	4123	327	19	346	11862
November	3343	28	-	-	1429	1	17	-	75	-	4893	2	12	2878	1005	3897	111	5	116	8906
December	2597	64	-	-	999	-	-	-	78	-	3738	5	8	3353	793	4159	57	5	62	7959
Q_4	10748	159	138	-	4577	6	60	28	308	-	16024	13	33	9254	2879	12179	495	29	524	28727
TOTAL	67327	10269	11086	1014	33920	1260	2683	28	70938	1414	199939	76	436	51476	11440	63428	42855	584	43439	306792

SOURCES: Transport Canada, Alaska Highway Traffic Count (1972-Adjusted), Stats Canada

EXHIBIT I

TOURISTS TRAVELLING IN YUKON

The actual number is not known, since detailed research into travel by residents and non-residents alike in Yukon has never been fully undertaken, though extensive research into specific types of non-resident tourists has been done.

The Estimate

What is believed to be a close estimate of the total number of tourists has been made for 1983 at the Territorial level. The border crossing data developed from statistics provided by Statistics Canada, various transportation companies, as well as from estimates made for traffic through Watson Lake where no physical count is made for Yukon. However, it does not indicate the actual number of tourists travelling in and through Yukon, since any visitor passing through Yukon enroute to Alaska, who subsequently re-enters Yukon enroute back south, is counted twice. Similarly, Yukoners travelling wholly within Yukon without crossing a border are not counted at all in these statistics.

The number of tourists travelling in Yukon in 1983 is estimated to be as follows, computed by major traveller characteristic:

A. Yukoners travelling with Yukon taking an average of about 5.7 trips each, account for 137,000 tourist trips:	137,000

B. Visitors to Yukon (i.e., non-residents) spending one or more nights in Yukon during their entire trips, with double counting caused by entering Alaska and re-entering Yukon eliminated:

Mode of travel when departing from Yukon:

Auto:	156,000
Bus:	41,000
Air	41,000

Total non-resident visitors spending one night or more in Yukon: 238,000

C. Visitors to Yukon (i.e., non-residents) spending less than one day in Yukon during their entire trip: 56,000

Estimated total number of person trips into and within Yukon by Yukoners and visitors travelling for tourism related purposes regardless of duration of trip in Yukon: 431,000

Therefore, 294 thousand non-resident tourists visited Yukon in 1983. In addition, about 137 thousand tourist trips within Yukon result from multiple trip taking by residents of Yukon. A combined total of 431,000 tourist trips results.

Resident and Non-Resident Tourism

Given that this approximation of the number of tourist trips occurring into and within Yukon is reasonable, it deserves some explanation.

On first examination, it could be concluded that Yukoners account for one third of the tourism in Yukon. This is not true. Obviously local residents take many tourism related trips each year within the Territory to visit friends, relatives and favorite outdoor recreation areas, to attend events such as curling bonspiels, winter carnivals, festivals, and to sightsee or go shopping in Whitehorse and other centres. The vast majority of these are of short duration, usually for a weekend, and probably involve relatively low expenditures for food and accommodation while on the trip, since food can be brought from home, and a camper, cabin, tent or friend's home may well be used for accommodation. For many trips by Yukoners, gas, meals out, shopping and entertainment may be the only direct or visible tourism expenditures they make while on the trip. However, when tourism-related expenditures made prior to a trip are considered, overall tourism impact by Yukoners becomes more significant. Purchases in Yukon of goods and services such as camping gear, sporting equipment, food, alcohol, and vehicle maintenance/modifications required for recreational trips all contribute to the tourism industry. Therefore, Yukoners as local tourists make significant though less visible contributions to the tourism industry and economy.

Non-resident visitors are completely different. Their vacation trips often last longer in Yukon, since they are in Yukon for perhaps the only opportunity in their lives, and they want to see as much as possible. They are far more likely to use commercial accommodation, since many travel by mass mode rather than by personal transportation.

Summary - How Many Tourists?

To summarize this section then, roughly 431 thousand tourist trips were made into/within Yukon in 1983. Yukon residents appeared to account for about one third of these numerically, though their trips were probably much shorter and had much less impact upon certain sectors of the industry, particularly the accommodation sector and distribution channels. However, their direct and indirect impact on the other four sectors is important.

Non-resident tourists account for the other two thirds of tourist-related trips in Yukon and have far greater visible impact throughout the different sectors of the industry, due to their longer periods of stay and their dependence upon locally provided goods, services and facilities for many of their essentials, such as transportation, food and beverages and accommodation. All tourists, both resident and non-resident, contribute directly to the events and attraction sector, and to the recreation, entertainment and miscellaneous services sector.

This "answer" is an approximation developed in part from methodology devised by Thorne Stevenson and Kellogg, a tourism research firm. Their methods and assumptions have been somewhat modified by the Department of Tourism, based on local market knowledge.

TOURIST EXPENDITURES

Overall Estimate

During the summer of 1982, a Visitor Exit Survey was undertaken by the Tourism Planning and Development Branch. Preliminary analysis of the data collected from this survey has recently been completed, and as a result, direct tourist expenditures can be estimated with greater accuracy.

This estimate is based on U.S. residents, non-Yukon Canadian residents, and residents of other countries entering Yukon for any length of stay. From Statistics Canada border crossing data, we are able to separate same-day traffic from visitors who stayed one night or longer. By utilizing these figures and those which are reported in the Visitor Exit Survey, it is possible to estimate direct tourist expenditures in Yukon at $77 million. Since detailed data on resident travel expenditures in Yukon is not available, we can assume that all but $6 million was spent by non-resident visitors.

If the multiplier effect of this $77 million in direct tourist expenditure in Yukon for 1983 is taken into consideration, the total impact of tourist spending amounts to at least $98 million (if a very conservative multiplier of 1.276 is used, as was computed a few years ago by the Yukon Economic Impact Simulation Model).

It is important to note that, in previous years, expenditure estimates were based on available, but incomplete data and were conservatively low. This year, it is felt that the 1982 Visitor Exit Survey has provided us with more reliable

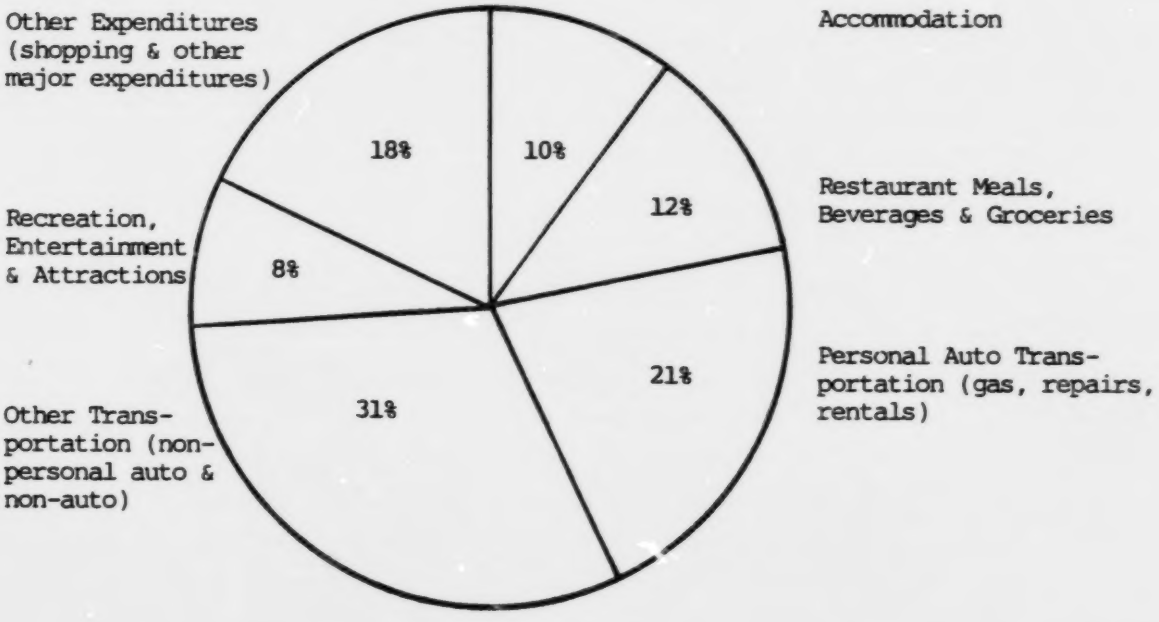
expenditure data, and therefore less assumptions need to be made. Expenditure estimates can then be calculated with a greater degree of confidence.

Distribution of Tourism Expenditures in the Industry

The impact of this spending in Yukon by non-residents is felt throughout different sectors of the tourism industry. Data obtained from the 1982 Visitor Exit Survey identifies travel party expenditures by major spending categories. The following chart is based on that study and illustrates where the average visitor's dollar went in Yukon during the summer, 1982.

CHART #5

THE NON-RESIDENT'S TOURIST DOLLAR,
HOW IT WAS SPENT IN YUKON, 1982



Source: Derived from 1982 Visitor Exit Survey, undertaken by Yukon Department of Tourism, Recreation & Culture, Tourism Planning & Development Branch.

As is shown, the greatest expenditures occurred in the category, "other transportation". This would refer to the usage of air and motorcoach transportation while travelling within the Territory. Other categories identified by the 1982 Visitor Exit Survey reveal similar percentages to those categories illustrated by the 1981 Coupon Conversion Study. For example, the Visitor Exit Survey shows 10% of the tourist dollar is spent on accommodation, 8% on entertainment and 21% on personal auto transportation. Comparatively, the 1981 Coupon Conversion Study reports 13% of the tourist dollar is spent on accommodation, 13% on entertainment and 24% on personal auto transportation. From these comparisons, it is perceived that tourist dollars are, and have been, readily divided among the various sectors of the industry.

Exhibit "J"

Yukon Border Crossings and Estimated Expenditures, 1970-1983

Calendar Year	No. of persons Entering Yukon	Estimated Expenditures
1970	156,416 (13%)	$10 million
1971	183,681 (17%)	12 million
1972	270,897 (21%)[1]	22 million
1973	311,374 (15%)	25 million
1974	325,310 (4%)	26 million
1975[2]	318,063 (-2%)	27 million
1976	306,792 (-4%)	21 million[3]
1977	300,154 (-2%)	29 million[3]
1978	362,905 (20%)	33 million[4]
1979	362,174 (-.2%)	36 million[4]
1980	340,440 (-6%)	38 million[4]
1981	386,772 (14%)	51 million[5]
1982	365,057 (-6%)	51 million[6]
1983	394,154 (8%)	77 million[7]

Sources: Transport Companies
Alaska Highway Traffic Count (1972 Adjusted)
Statistics Canada

1. 21% represents real increase over 1971; figures resulting from new counting methods have been excluded for comparison purposes.

2. Post-1974 figures on number of persons entering Yukon are taken from Statistics Canada Border Crossing Reports. Prior to 1975, figures represent Canada

Customs Border Crossing Counts, which have a variance of -2% to 4.5% over Statistics Canada figures. This different counting technique has resulted in some minor changes to totals previously published.

3. Based on Tourism Expenditure Model (Yukon).

4. Rough expenditure estimate, projected from 1977 figure.

5. The 1981 figure of $51 million is based on direct visitor expenditure data obtained through the 1981 Coupon Conversion Study. Since a different methodology was used, comparison of 1981 direct expenditures to those of previous years would be of doubtful validity. If it is assumed that all spending by U.S. residents was in U.S. dollars in 1981, and they received an average currency exchange of 1.18 to convert to Canadian dollars, the 1981 figure of $51 million could rise as high as $57 million. However, the rate of exchange is not fixed, some tourist establishments pay a much lower rate, and the figure of $51 million, while conservative, is much closer to being realistic.

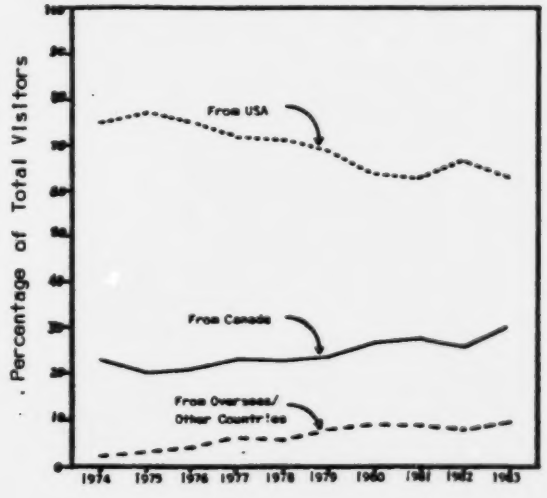
6. Expenditure data was not available for 1982. However, given the slight decline in traffic, and the usual increase in prices, it is conservatively estimated that 1982 expenditures at least equal those of 1981.

7. The 1983 figure of $77 million is based on direct visitor expenditure data obtained through the 1982 Visitor Exit Survey and applied to Statistics Canada Border Crossing information. Although a different source for expenditure data was utilized (Visitor Exit Survey 1982 vs. Coupon Conversion 1981), the methodology employed was very similar, therefore comparisons to 1981 expenditure data are valid.

VISITOR POINTS OF ORIGIN

Based on visitor registrations at Tourism Yukon-operated Visitor Reception Centres during the period late May through late September inclusive, the composition of Yukon visitors has been steadily changing in terms of country of origin. Generally, residents of Canada have been steadily increasing their share of the total visitor traffic to Yukon, rising from 20% of total visitors in 1975 to 26% in 1982. In 1983, Canadian traffic continued to increase, to 30%. In contrast, between 1975 and 1982, U.S. originating visitor traffic steadily dropped in share of total traffic from 77% in 1975 to 67% in 1982. This trend continued in 1983 with 61% of total summer visitors originating from the United States. The most remarkable gains have been in traffic from Overseas and other countries, which has tripled its share of total visitor traffic from 3% in 1975 to 9% in 1983. This is a slight increase from 1982's 8% share. (Chart #6)

CHART #6
Percentage of Yukon visitors originating from each of three major markets: 1974-1983



Though U.S. originating visitation accounts for the largest share - 61% - of visitors registered at all six Visitor Reception Centres throughout Yukon in 1983, the relative share of visitors from each market varies considerably at each Centre, as Chart #7 indicates. At Beaver Creek registrations by Canadian residents account for 12% of total visitation at the centre, compared to 81% for U.S. residents and 7% for visitation from Overseas/other countries, much the same as in 1982. In contrast to this, at Dawson City and Whitehorse, the traffic is much more balanced among the three markets, with Overseas/other countries originating traffic accounting for 10% and the remaining 90% split between Canadian and U.S. originating visitation with slightly heavier emphasis on the United States. Watson Lake, Carcross and Haines Junction's visitation approximates that of Whitehorse, with U.S. originating visitation dominant as well.

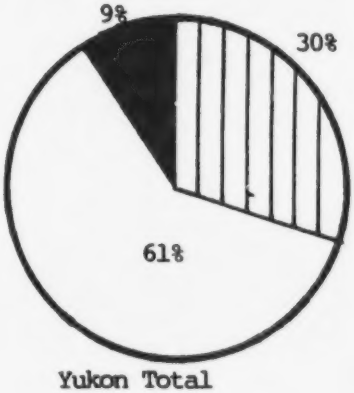
The increasing numbers of Canadians visiting Yukon in relation to visitors from the U.S. has a very beneficial effect - Canadians tend to stay in Yukon considerably longer than Americans. Two recent surveys conducted by the Department of Tourism support this statement. The 1982 Visitor Exit Survey found that over 75% of Canadians spent more than 6 nights in Yukon, while the majority of Americans spent only 3-5 nights. (It is interesting to note, from this survey, that over 66% of overseas visitors spent 6 nights or more in Yukon as well). Results from the 1983 Advertising Response Conversion study show that Canadian respondents spent an average of 7.9 nights in Yukon compared to 6.5 for Americans. Canadians probably tend to stay longer in Yukon, because they come to Yukon for business purposes and/or to visit friends and relatives as well as on vacation, while Americans either "pass through" the territory on their way to Alaska or are on a structured package tour. It should be noted that Conversion Study

results will usually be slightly higher due to the "loyalty" factor to the destination visited. That is, those who visited for the longest period of time would feel most attachment to the area, and therefore, likely respond to our survey.

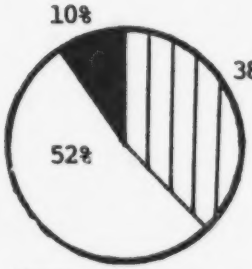
Point of origin calculations are based on a combined total of 109 thousand visitor registrations in 1983 at six Visitor Reception Centres operating throughout Yukon each summer. Of this total number of visitors who registered, 67 thousand were from the U.S., 33 thousand from Canada (including Yukon) and 9 thousand from Overseas and other countries.

CHART #7

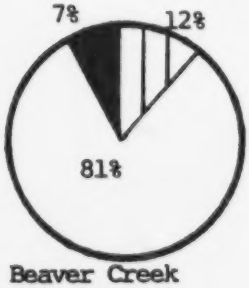
COMPARISON OF RATIO OF CANADIAN, AMERICAN AND OVERSEAS VISITOR VOLUMES TO EACH OTHER AT EACH OF SIX LOCATIONS IN YUKON IN RELATION TO YUKON'S OVERALL TRAFFIC, BASED ON VISITOR INFORMATION CENTRE REGISTRATIONS, MAY-SEPTEMBER 1983.



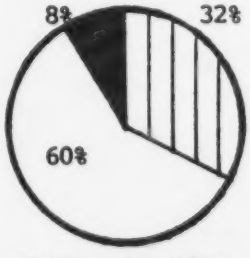
Yukon Total



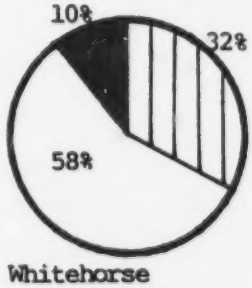
Dawson City
27% of total



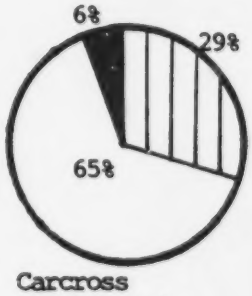
Beaver Creek
13% of total



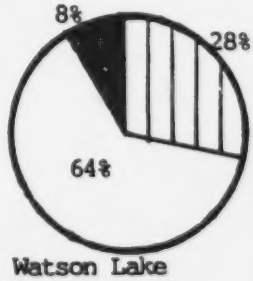
Haines Junction
20% of total



Whitehorse
11% of total



Carcross
6% of total



Watson Lake
17% of total

EXPLANATORY NOTE CONCERNING VISITOR POINT OF ORIGIN DATA

All analyses of visitor points of origin are based on registrations at six Visitor Information Centres located throughout Yukon at major access points. The Centres operate during the period late May through mid-September inclusive, and only record visitors who register voluntarily in the guest books.

The drawbacks of using these registrations to determine visitor points of origin are:

- visitors may register at more than one Centre;
- since registration is voluntary, certain types/groups/nationalities of visitors may be less likely to register than others, due to language or other factors.

Therefore, there is no pre-determined sampling technique involved to ensure that all visitor categories are reliably represented.

On the plus side however:

- very high numbers of records are involved, with nearly 115 thousand visitors registered in 1982 (the record high to date);

- the percentages of Canadian and American visitors originating from the various regions in their respective countries in 1982 based on these registrations, closely match point of origin data obtained by the 1982 Visitor Exit Survey. (ie. the

Visitor Exit Survey reports 23% Canadian, 73% U.S. and 4% Overseas visitors, compared to 26% Canadian, 67% U.S. and 8% Overseas visitors calculated from VRC registrations). Both data gathering methods operated during the same summer months at essentially the same locations, resulting in a high degree of comparability being possible.

UNITED STATES ORIGIN

The United States market is Yukon's prime source of tourist visitors. In 1983, two thirds of Yukon's summer visitors were Americans.

For 1983, ten U.S. states as a group were the points of origin for 61% of the 67,068 U.S. visitors registered at Yukon Visitor Reception Centres. In descending order of number of visitors registered and per cent share of total U.S. visitors to the Centres, these states are:

Chart #8

Top ten U.S. States as point of origin	No. of visitors registered	% of total U.S. visitors registered
California	9,406	14%
Alaska	9,249	14%
Washington	4,498	7%
Oregon	3,133	5%
Florida	2,853	4%
Texas	2,509	4%
Michigan	2,497	4%
Minnesota	2,384	3%
Illinois	1,873	3%
Pennsylvania	1,832	3%
TOP 10 TOTAL	40,234	61%

The following chart identifies the eleven origin regions into which the U.S. is sub-divided for analysis purposes, and presents data on the per cent of U.S. visitation to Yukon Visitor Reception Centres originating from each region. It also relates each region's share of U.S. originating traffic to the region's share of the total U.S. population in 1980 as an indicator of the propensity of residents of each region to visit Yukon. For example, 26% of Yukon visitation from the U.S. originates from the Pacific States, though only 13% of the U.S. population lives there. In contrast, 2% of Yukon visitation originates from New England, home for nearly 6% of the U.S. population.

Chart #9

Regional point of origin data on U.S. visitors to Yukon in 1983, based on registrations at Yukon Visitor Reception Centres and 1980 U.S. census data.

Origin	% Share of U.S. Visitors Originating From Each Region in 1983	% of U.S. Population In Each Origin Region
Alaska	14	0.2
Pacific Region	26	13.4
Mountain Region	10	5.0
West N. Central	11	7.6
West S. Central	6	10.5
East N. Central	14	18.4
East S. Central	2	6.5
Mid-Atlantic	7	16.2
South Atlantic	8	16.3
New England	2	5.5
Hawaii & Misc.	-	0.4
U.S. All Regions	100	100.0
Total Registrations	67,068	

The following map shows the regions into which the United States has been divided for analysis purposes.

United States Analysis Regions

Percentage of Yukon Visitors originating from the United States by region 1980 - 1983

ORIGIN	% of Total Visitors from All Markets				% of Total Visitors from Within U.S.				% Change in Number of Visitors		
	1983	1982	1981	1980	1983	1982	1981	1980	1983/82	1982/81	1981/80
Alaska	8	8	5	5	14	12	8	8	-	6	22
Pacific Region	16	17	16	17	26	25	26	26	-10	4	19
Mtn Region	6	6	6	6	10	9	9	8	-1	7	32
West N. Central	7	6	6	5	11	9	10	8	5	-1	53
West S. Central	4	5	5	4	6	7	8	6	-24	-1	66
East N. Central	8	8	10	10	14	14	15	16	-16	4	13
East S. Central	1	1	2	1	2	3	3	2	-22	-2	122
Mid Atlantic	4	4	4	5	7	6	7	8	-3	-1	7
South Atlantic	5	6	6	6	8	10	10	10	-26	3	27
New England	2	2	2	2	2	2	3	3	-18	-3	10
Hawaii & Misc.	-	-	-	3	-	-	-	4	-87	-	-
USA TOTAL*	61	67	63	64	100	100	100	100	-12	9	22

*Columns may not add to Totals due to rounding

EXHIBIT K

CANADIAN ORIGIN

The Canadian market contributed 30 per cent to Yukon's visitor traffic in 1983, based on visitor registrations at Yukon's six Visitor Reception Centres.

As Chart #10 indicates, nearly two thirds of Yukon's Canadian visitors were from west of the Ontario-Manitoba border.

Chart #10

Regional point of origin data on Canadian visitors to Yukon in 1983 based on registrations at Visitor Reception Centres and Canadian 1981 population estimates from Statistics Canada.

Origin	% Share of CDN Visitors Originating From Each Region in 1983	% of CDN Population In Each Origin Region
British Columbia	22	11.2
Alberta	26	8.9
Sask-Manitoba	16	8.3
Ontario	21	35.7
Quebec	2	26.3
Atlantic Canada	2	9.4
NWT	2	0.2
Yukon	9	0.1
CANADA TOTAL	100	100.0%

Together the four western provinces accounted for 64% of all Canadian visitation, up steadily and significantly from the 57% share these provinces had in 1978. The share of total visitation by Canadians from Ontario now stands at 21%, down slightly from the 23% share of 1978. Visitation from east of Ontario has remained steady over the past four years, accounting for about 4% of all visitation by Canadians in each year.

Distance is a major factor in Canadian visitation to Yukon. Chart #10 notes that almost half of Yukon's Canadian visitors originate from British Columbia and Alberta, home of barely 21% of the Canadian population in 1981. By comparison, Ontario contains 36% of the Canadian population yet only 21% of Yukon's 1983 visitors originated from that province.

More detailed data on Canada as a point of origin for visitors registering at Yukon Visitor Reception Centres is provided in Exhibit L following.

Percentage of Yukon Visitors Originating from Within Canada, by Region, 1980-1983

ORIGIN	% of Total Visitors From All Markets				% of Total Visitors From Within Canada				% Change In Number Of Visitors		
	1983	1982	1981	1980	1983	1982	1981	1980	1983/82	1982/81	1981/80
B.C.	7	6	8	8	22	23	28	28	9	-1	26
Alberta	8	7	8	7	26	27	27	26	8	-2	29
Sask./Manitoba	5	5	4	3	16	18	14	10	-	2	74
Ontario	6	5	6	6	21	18	20	22	26	-1	13
Quebec	1	1	1	1	2	2	3	2	17	-3	44
Atlantic Canada	-	-	1	1	2	2	2	2	33	-3	69
NWT	-	-	1	1	2	2	2	2	12	-1	26
Yukon	3	2	1	2	9	7	5	6	46	3	10
Misc.	-	-	-	-	-	1	-	1	-1	-	-
CANADA TOTAL*	30	26	28	27	100	100	100	100	12	-7	28

*Columns may not add to Totals due to rounding

EXHIBIT L

OVERSEAS/OTHER COUNTRIES ORIGIN

Generalizations about traffic originating from this group of countries cannot be made reliably, due to the markedly different trends observed in Visitor Reception Centre registrations from these countries.

Three European countries, plus Australia-New Zealand, are all prominent in terms of the share of total visitors from Overseas/other countries which they contribute. West Germany alone accounted for 43% of the over 9 thousand Overseas/other countries visitors who registered at Yukon Reception Centres in 1983, consistent with its share in 1982, and an increase in share from its 1980 level of 38%. Switzerland accounted for 13%, and the United Kingdom 7%, generally consistent with 1980. If the three German-speaking European countries - West Germany, Austria and Switzerland - are treated as a distinct market, then fully 60% of Yukon's Overseas/other countries visitors are German-speaking. In total, Europe accounts for three quarters of Yukon's visitors from Overseas/other countries. Australia contributed 13% and New Zealand 3%, for an Australasia total of 16%, down from 1980's combined total of 18%.

CHART #11

POINT OF ORIGIN DATA ON VISITORS TO YUKON FROM OVERSEAS/OTHER COUNTRIES IN 1983, BASED ON REGISTRATIONS AT VISITOR INFORMATION CENTRES IN YUKON

ORIGIN	% of Share of Visitors From Overseas/Other Countries Originating From Each Area
Germany	43
Switzerland	13
United Kingdom	7
Netherlands	2
France	2
Sweden	1
Austria	3
Australia	13
New Zealand	3
Japan	1
Mexico	-
Miscellaneous	12
OVERSEAS/OTHER COUNTRIES TOTAL	100

More detailed data on Overseas/Other Countries as points of origin for visitors registering at Yukon Visitor Information Centres is provided in Exhibit M immediately following.

Percentage of Yukon Visitors Originating from Overseas and Other Countries, by Country, 1980-83

ORIGIN	% of Total Visitors from All Markets				% of Total Visitors from O/S and other areas				% Change in Number of Visitors		
	1983	1982	1981	1980	1983	1982	1981	1980	1983/82	1982/81	1981/80
Germany	4	3	4	3	43	43	43	38	4	-1	44
Switzerland	1	1	1	1	13	15	13	12	-9	2	40
United Kingdom	1	-	1	1	7	6	7	8	2	-1	13
Netherlands	-	-	-	-	2	2	4	4	-20	-4	10
France	-	-	-	-	2	4	3	3	-54	19	44
Sweden	-	-	-	-	1	2	2	2	-43	-4	84
Austria	-	-	-	-	3	2	2	2	52	-1	56
Australia	2	1	1	1	13	14	12	14	-	6	5
New Zealand	-	-	-	-	3	2	3	4	52	-4	-6
Japan	-	-	-	-	1	1	1	1	-36	-1	53
Mexico	-	-	-	-	-	1	-	1	-33	32	-16
Misc.	1	1	1	1	12	8	9	12	73	-3	-3
OVERSEAS/OTHER TOTAL*	9	8	9	9	100	100	100	100	5	-10	27

*Columns may not add to Totals due to rounding
- Denotes insignificant

ACCOMMODATION SECTOR[1]

Overview

The accommodation sector, consisting of hotels, motels, highway lodges, resorts, and government/private campgrounds earns about 10 per cent of every dollar spent each day by tourists visiting Yukon during the peak season (June through September). In numbers, fixed roof accommodation establishments (hotels/motels/highway lodges) in Yukon totalled 80 establishments in 1983/84, and at least 72 campgrounds, about 50 of which were operated by the Government of Yukon, were also available.

The balance of the analysis contained in this section is limited to commercial fixed-roof accommodation.

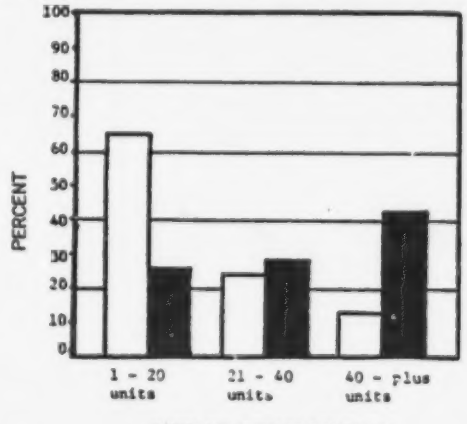
Size Distribution

The 80 fixed roof accommodation establishments known to be operational in 1983/84 offered a total of about 1942 units, comprising hotel/motel rooms and cabins.

Small establishments, those with 20 units or less, are most numerous, accounting for 64% of all fixed-roof accommodation establishments,

CHART #12

Percentage of Yukon Fixed Roof Accommodation Establishments & Units in each size range, 1983/84.



while large establishments, all offering 40 or more units, are small in number, amounting to only 13% of all establishments. See Chart #12, white bars.

In contrast, as the black bars in Chart #12 indicate, the majority of Yukon's fixed-roof accommodation units - 43% - are found in large establishments, while only 27% of all units are available from small establishments.

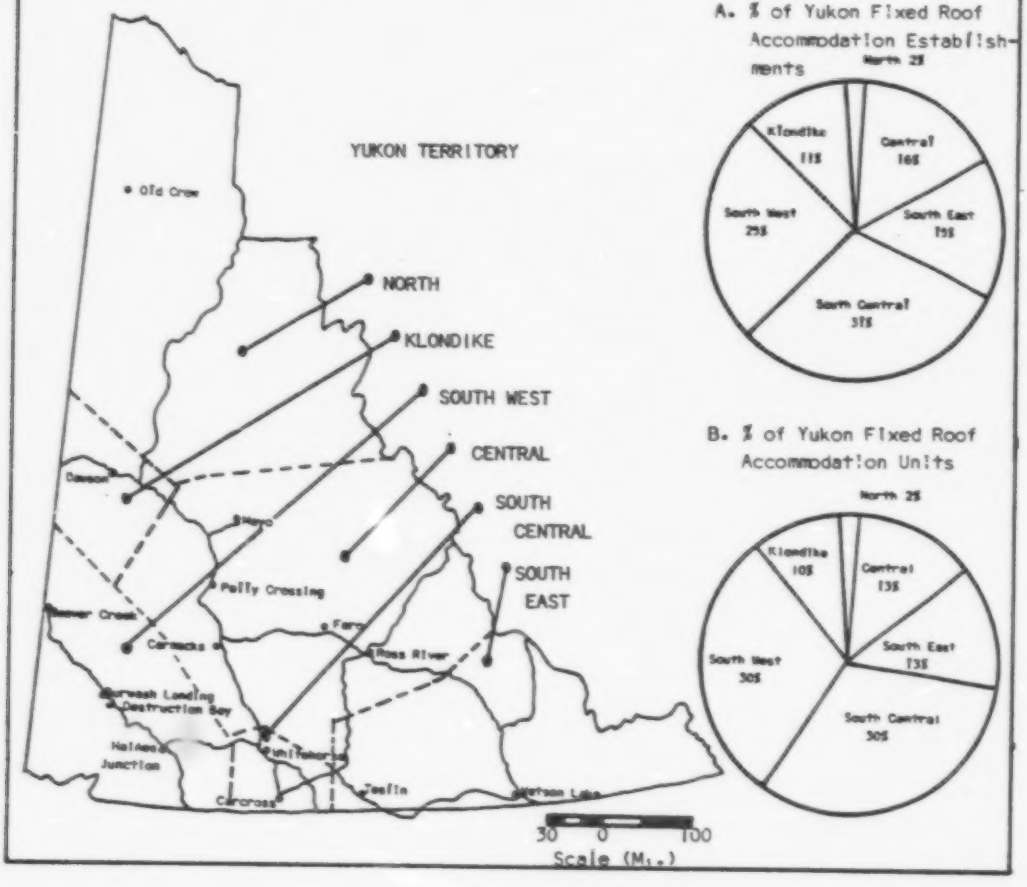
[1]Source: Calculated from data collected annually on accommodation establishments throughout Yukon and published in Tourism Yukon's 1983/84 Travel Agent's Manual.

Regional Distribution

Nearly half of Yukon's fixed-roof accommodation units are located in the South Central region, which is dominated by Whitehorse. Significant numbers of units are clustered in other communities, depending upon the volumes of traffic frequenting the area. Chart #13 illustrates this regional distribution graphically, showing the distribution of establishments and units among Yukon's six tourism planning regions.

CHART #13

Distribution of fixed roof Accommodation Establishments and Accommodation Units in Yukon, by region, 1983/84.



Seasonality of Supply

Many accommodation establishments depend upon the high traffic levels experienced during the peak season from June through September. Once the season is over, nearly 80 per cent of the fixed roof accommodation establishments remain open, while the remainder close for the winter.

On a region by region basis, seasonal variations are the lowest in Whitehorse, where about 95 per cent of the establishments and available fixed roof units are open year-round. In the other regions, about three quarters of the establishments stay open, though the volume of rooms offered varies considerably from region to region.

Detailed information on the accommodation industry, providing data by region, and by year from 1981 to 1984, is included at the end of this section in Exhibit N as follows:

EXHIBIT N Summary of Hotel/Lodge/Motel Sector Yukon Tourism Industry - Number of Establishments, by Number of Units, 1981-1984.

Summary of Hotel/Lodge/Motel Sector of Yukon Tourism Industry
Number of Establishments, by Number of Units, 1981-1984

NUMBER OF UNITS	1980/81		1981/82		1982/83		1983/84	
	Number of Establishments	% of Units in Yukon	Number of Establishments	% of Units in Yukon	Number of Establishments	% of Units in Yukon	Number of Establishments	% of Units in Yukon
1 - 10	33	12.8	32	11.4	33	11.3	33	11.5
11 - 20	16	13.4	17	14.1	17	14.7	18	15.4
21 - 30	12	17.6	12	16.2	10	13.5	9	13.6
31 - 40	8	16.0	7	12.3	10	17.6	9	16.2
41 - 50	3	7.9	4	9.9	3	7.4	3	7.5
51 - 100	5	18.3	5	16.8	5	17.0	5	17.2
100+	2	13.9	2	19.4	2	18.5	2	18.6
TOTAL	79	100%	79	100%	80	100%	80	100%
Total Number of Units	1,784		1,906		1,942		1,942	

Source: Computed through Yukon Travel Agent's Manuals, 1981,1982,1983,1984.

NOTE: The years are identified as 1983/84, since data is originally published late in the earlier year through the Yukon Travel Agent's Manuals.

Read as follows: Example - in 1982, 79 tourist accommodation establishments were operational in Yukon on a year round or seasonal basis, and as a group offered about 1,906 units. Two establishments each offered over 100 accommodation units, and combined, accounted for 19% of the total accommodation available in Yukon. In contrast, 32 establishments, in the 1 to 10 room category, jointly represent 11% of the total number of units offered in Yukon.

EXHIBIT N

FOOD & BEVERAGE SECTOR

Overview

The Yukon Food and Beverage Sector of the Tourism Industry derives substantial income from resident and non-resident tourists travelling in Yukon. Research conducted in 1983 indicates that on average about 12 per cent of daily expenditures in Yukon by non-resident tourists goes to the purchase of food and beverage. This money is spent in licensed restaurants, cafes, lounges, taverns, fast food outlets, grocery stores, liquor stores and commercial off-sales liquor outlets.

The number of these establishments throughout Yukon in 1983 is significant. Preliminary figures indicate that Yukon is served by approximately 100 establishments serving prepared meals, 80 of which operate on a year round basis. Fifty-four of these 100 establishments are licensed to serve alcoholic beverages with meals. In addition to these cafes, restaurants and fast-food outlets, there are approximately 44 public lounges and taverns specializing in alcoholic beverages, all of which are located in fixed roof accommodation establishments.

The retailing of unprepared food and beverages for consumption off the premises through grocery stores, liquor stores and commercial off-sales of alcohol plays a significant part in the tourist's food and beverage expenditures, with many tourists spending 40 per cent of their total food and beverage expenditures on unprepared food and sealed alcoholic beverages.

Preliminary figures indicate that this component of the food and beverage sector consisted of at least 17 grocery stores, 6 government operated liquor stores, and 44 commercial establishments (mostly accommodation establishments) selling sealed alcoholic beverages for consumption elsewhere.

Regional Distribution and Seasonality

All types of establishments are located throughout Yukon. This is particularly true of grocery stores and liquor outlets, since they serve their local populations on a year round basis as well as seasonal tourists. Concentrating solely on food establishments which serve prepared food for consumption on the premises, it is evident that this portion of the food and beverage sector is regionally distributed on much the same basis as the fixed roof portion of the accommodation sector. Ninety-five per cent of food and beverage establishments in Whitehorse operate year round. Elsewhere, just over two thirds operate year round.

EVENTS & ATTRACTIONS SECTOR

Perhaps more than any other sector, the events and attractions sector is heavily dependent upon tourism for its livelihood. Businesses in other sectors, such as transportation, accommodation, and food and beverage, derive a portion of their annual revenue from other forms of traffic, such as movement of freight, provision of accommodation to migrant workers, and feeding the local population.

Events and attractions, on the other hand, largely cater to the leisure time of individuals. The size of the sector is difficult to assess, but its scope and distribution is not. Events such as craft fairs, festivals, bonspiels and sporting events are held throughout the Territory, and draw Yukoners and non-residents alike. Attractions are also spread throughout the Territory and range from commercial attractions, such as Diamond Tooth Gerties Gambling Hall in Dawson City, to historic and scenic attractions which do not always derive direct revenue from visitors but which do provide a major incentive to people to come into and explore a community or region.

Attendance at events is difficult to measure, due to the short duration of the event and the often large influx of locals, other Yukoners, and non-resident tourists who come to watch and participate.

Attractions, by virtue of their much longer periods of operations, provide an excellent barometer of the fluctuations in tourist traffic experienced by a community or region from year to year.

ATTENDANCE AT REGIONAL ATTRACTIONS & VISITOR INFORMATION CENTRES

Watson Lake

With completion of the new Alaska Highway Interpretive Centre, visitor registrations have risen significantly in 1983, recording a 33% increase over 1982. Visitation figures for 1983 surpass any previous figures recorded. The steadily increasing percentage of highway travellers, and the completion of the Alaska Highway historic display account for much of this increase.

Whitehorse & Area

Visitor attendance at Whitehorse attractions and information centres registered increases in 1983 over 1982. The prime attraction in terms of number of visitors was the S.S. Klondike Historic Site, which received over 43,000 visitors in 1983, a record high and up 9% over 1982. The MacBride Museum recorded 23,000 visitors. The Whitehorse Visitor Reception Centre showed a 40% gain over 1982's total and exceeded the record set in 1978. Completed renovations to the Visitor Reception Centre may have contributed to this increase in visitation. South of Whitehorse, the Teslin Museum recorded 1,900 visitors in 1983.

Beaver Creek

The number of visitors registering at the Beaver Creek Visitor Reception Centre rose 14% in 1983 over 1982. This increase is most likely due to the increase in highway travellers (as noted for the Watson Lake Visitor Reception Centre as well).

Faro & Yukon River

One of the few indicators available to calculate tourist numbers along the Robert Campbell Highway has been the tour of Cyprus Anvil's lead-zinc mine just outside of Faro. With the closure of this mine in 1982, tourist patterns in Faro were completely disrupted. In 1983, Cyprus Anvil Mine operated on a minimal scale and thus the mine tour was in operation and recorded about 144 participants. The Faro Information Centre received 304 visitors.

A rough indicator of canoe traffic on the Yukon River is provided by the guest book at Fort Selkirk, an abandoned community now being stabilized and restored at the confluence of the Pelly and Yukon Rivers. Since it is approximately 30 miles from the nearest public road, most visitors are canoeists. In 1983, 635 people signed the guest book, a 20% decrease from 1982 figures.

Carcross

The new Visitor Reception Centre in Carcross was completed in 1983. The Reception Centre offers an interesting riverboat interpretation which probably attracted many of the almost 10,000 visitor registrations. An additional attraction, new for 1983, was the development of a luncheon theatre show in the former White Pass Warehouse adjacent to the railway depot (also refurbished). This live vaudeville show was responsible for bringing an estimated 16,000 visitors (mainly through purchase of cruise ship shore excursions from Skagway) to Carcross for the day. Estimated traffic on the Chilkoot Trail continued to decline, with about 1,800 backpackers completing this historic trek. The suspension of railway service between Bennett (termination point of Chilkoot Trail) and Carcross or Whitehorse is probably responsible for the 10% decrease recorded in 1983 from 1982.

Dawson City & Area

Dawson City visitation as recorded at nine different attractions declined slightly from 1982. Overall, Parks Canada's historic sites received about 95,000 visitors, a 10% decrease. Individually, attendance at the Gaslight Follies remained constant, visitation of the old Post Office increased slightly, and the remaining Parks Canada attractions recorded slight decreases. The Dawson City Museum showed a decrease from 14,000 to 10,000 visitors and the newly reconstructed Visitor Reception Centre recorded a slight increase of 5% in 1983 from 1982. Opening of the mining museum in Keno drew an estimated 300 visitors to that area.

Haines Junction & Kluane National Park

The joint Parks Canada/Tourism Yukon Visitor/Interpretive Centre in Haines Junction recorded significant declines in traffic in 1983. A major bus tour operator did not include the Interpretive Centre as a scheduled stop in 1983 (which had been included in past years), and likely contributed to the decrease in visitors recorded at this attraction.

In addition to the nearly 22,000 visitors to the Haines Junction Interpretive Centre recorded by Tourism Yukon, over 3,000 people visited the Parks Canada facility outside of peak season (May through September).

Elsewhere in Kluane National Park, almost 20,000 people visited Parks Canada's Sheep Mountain Information Centre, and 629 backpackers registered with officials prior to trips of one night or more into the wilderness. Kathleen Lake campground, the only one operated by Parks Canada, recorded almost 1,200 visitor parties. The Kluane Museum of Natural History recorded 8,200 visitors in 1983.

Detailed figures indicating the numbers of visitors recorded at specific attractions and Visitor Reception Centres throughout Yukon, plus trends over the past number of years, are included in Exhibit P immediately following.

NOTED RELATED TO EXHIBIT

1. S.S. Klondike re-opened July 1, 1981 as a completely restored vessel with a new interpretive centre and fresh landscaping. 1983 figure includes visits outside of operating hours.

2. Kathleen Lake Campground figures are "number of parties", which on average involve 3 people.

3. The 1982 figure for the Haines Junction Interpretive Centre was incorrectly reported. The revised figure for 1982 is 46,987.

4. Fort Selkirk is an abandoned settlement on the Yukon River about half way between Whitehorse and Dawson City. Now being stabilized by the Yukon Government, it is only accessible by boat or air. It is a popular stopping point for canoeists.

5. Cyprus Anvil Mine was closed during the summer of 1982. As the mine began minimal operations in 1983, the mine tours resumed.

6. The Old White Pass Warehouse and Depot opened during the summer of 1983 and was visited primarily by shore excursion passengers from Skagway. This figure is approximate.

7. Dawson Museum figures for 1978, 1979 and 1980 have now been revised slightly downwards from previous reports based on more complete statistics from the Museum.

8. Formerly referred to as the Burwash Museum.

9. Teslin Museum did not open until August during 1981 season.

10. The Alaska Highway Interpretive Centre was completed in 1983.

11. Parks Canada records visitors year round, while Tourism Yukon only covers the period May through September, thus Tourism Yukon's figures for the centre are lower.

12. The reconstructed Northern Commercial Company Store, site of the new Visitor Reception Centre, opened in 1983.

13. The new Visitor Reception, located beside the S.S. Tutshi, opened in the Summer of 1983.

EXHIBIT P

ATTENDANCE AT VISITOR ATTRACTIONS AND RECEPTION CENTRES 1978-1983

NUMBER OF PEOPLE VISITING EACH SITE

	1978	1979	1980	1981	1982	1983
PARKS CANADA, WHSE.						
S. S. Klondike	29,024	32,342	31,404	40,252	40,012	43,281[1]
Chilkoot Trail	1,948	2,309	2,332	2,515	2,000	1,793
						45,074
PARKS CANADA, DAWSON						
Palace Grand - Day	11,425	10,195	11,651	27,656	14,576	12,259
Palace Grand - Follies	22,374	20,001	17,556	15,368	16,195	16,177
S.S. Keno	15,650	12,041	14,275	13,561	14,405	12,426
Robert Service Cabin	16,112	14,370	16,650	18,155	16,534	14,060
Old Post Office	12,762	14,108	15,568	11,342	11,522	12,248
Post Office Annex	--	--	--	--	2,869	--
Dredge #4	13,200	15,072	20,504	22,943	22,820	21,672
Harrington's Store	8,383	5,790	6,702	7,066	6,138	5,911
						94,753
PARKS CANADA, KLUANE						
Sheep Mtn. Info Centre	N/A	1,127	6,695	10,129	15,170	19,220
Backpackers	--	--	1,083	1,237	963	629
Kathleen L Campground	--	1,765	973	1,158	974	1,194[2]
Haines Junction Interpretive Centre	6,018	6,771	28,726	51,827	46,987[3]	29,683
						50,726
YUKON RIVER						
Fort Selkirk	955	928	909	713	800	635[4]
FARO						
Cyprus Anvil Tour	--	--	300	593	--	144[5]
Faro Info Centre	--	--	--	--	148	304
CARCROSS						
Old White Pass Warehouse & Depot	--	--	--	--	--	16,000[6]
MUSEUMS						
McBride Whitehorse	27,792	39,965	32,797	75,830	23,341	22,979
Dawson City	13,808	12,258	12,004	15,024	14,000	10,000[7]
Kluane/Natural History	12,000	14,388	?	?	?	8,253[8]
Teslin	690	860	?	300	1,200	1,900[9]
Old Log Church, Whse.	N/A	N/A	N/A	N/A	N/A	2,474
Keno Mining Museum	N/A	N/A	N/A	N/A	N/A	300
TOURISM YUKON INFORMATION CENTRES						
Watson Lake	11,199	9,262	9,335	15,875	13,904	18,468[10]
Whitehorse	14,897	13,429	10,635	12,698	12,554	17,606
Haines Junction	23,310	14,063	26,411	38,864	48,637	21,340[11]
Beaver Creek	25,959	26,123	17,429	16,030	12,312	14,074
Dawson City	27,938	23,453	27,780	27,634	26,683	28,157[12]
Carcross	--	--	--	--	--	9,575[13]
INFO CENTRES TOTAL	103,303	86,303	91,950	111,101	114,090	109,305

RECREATION, ENTERTAINMENT & MISC. SECTOR

Overview

This sector is really a catch-all, intended to include the variety of facilities and services which are essential to the tourism industry, and provide many jobs for Yukoners, but which do not fit into the other traditional industry sectors.

Research sponsored by the Department of Tourism in 1982 concluded that visiting tourists spent about 8 per cent of their daily expenditures in Yukon on "recreation and entertainment", and additional 18 per cent on "shopping and other related expenditures". These figures were developed through analysis of the characteristics and activities of visitors surveyed at Yukon exit points in 1982. Given that up to 26 per cent of each dollar spent by these visitors goes to this sector, the components of this sector deserve closer attention.

Composition

Two main groups of commercial enterprises are evident in this sector, those dependent primarily upon non-residents visiting Yukon, and those catering to both local residents and tourists alike.

In the first group are the wilderness vacation operators, each offering forms of wilderness/adventure travel. These activities include: guided and non-guided wilderness experience vacations involving backpacking, river running, extended ski tours, dog sled trips, nature appreciation and mountaineering, guided fishing trips, and guided big game outfitting. All of the above trips and activities are offered by Yukon-based companies, mostly owned and operated by Yukon residents.

The 1983/84 Travel Agent's Manual published by Tourism Yukon lists eight companies offering canoe and boat rentals, forty companies offering guided wilderness experience vacations and expeditions (ten featuring fishing) and twenty big game guiding outfitters who cater almost exclusively to non-resident hunters. All of these companies play a distinctive role in Yukon's tourism industry, by catering to tourists who seek a more intimate wilderness vacation in preference to touring throughout Yukon. To the overall tourism economy, this means that the industry is diversified, catering to a broad range of tourist interests.

The second broad component of the sector, which caters to local residents and tourists as well, includes retailers of sporting goods and recreational equipment; entertainment centres such as cinemas and bowling alleys; cultural centres such as live theatres; shops selling camera, film and health care products; and services such as laundromats and barbers.

In total, in excess of 130 local businesses in this sector contribute to and benefit from the tourism industry. Unfortunately, very little data is available to measure this sector further.

DISTRIBUTION CHANNELS

This is the least understood of all sectors and concerns itself with facilitating the movement of visitors, through the provision of a range of services that simplify trip planning. This component of the Yukon tourism industry often goes unnoticed, since most businesses are based outside of Yukon in the market areas from which Yukon draws its tourist business.

The front line is the travel agency, of which there are some 20,000 located throughout Canada and the United States. At least five are located in the Territory.

Less visible than the travel agent are the tour operators and wholesalers, those companies that package travel, assembling vacation components such as accommodation, transportation, inter-city touring, events and attractions, and food and beverage services, into pre-planned, inclusive-price vacation experiences which are marketed primarily through travel agents. Approximately 16 per cent of Yukon's 1983 visitors who previously requested Yukon travel information travelled in Yukon as part of a packaged tour. Most often these were group tours, travelling along at least a part of their preset itinerary by motorcoach.

The main attractions of an inclusive prepaid package vacation to the consumer are that the planning is done, all key facilities are prebooked, the major costs of the vacation are known in advance, and facilities and services such as an escorted tour bus are possible, which a consumer travelling independently would not have the opportunity of using.

In the 1984 Travel Agent's Manual, 123 tour companies are listed, all of whom offer pre-planned packages featuring Yukon alone or in conjunction with other destinations such as Western Canada, the Inside Passage and Alaska. Typically, these companies' tours feature travel by cruise ship, ferryliner, motorcoach, airline, or a combination of these modes of travel. Most of these companies assemble and operate their own tours, while others, particularly in Overseas and other countries, wholesale packages assembled by Canadian ground operators, including two based in Yukon. On a market by market basis, these tour operators/wholesalers are distributed as follows:

Canada	28
U.S.A.	33
Mexico	1
German-speaking Europe	34
Netherlands	6
United Kingdom	6
Australia-New Zealand	11
Other	4
	123

The third component of the Distribution Channels sector includes public and private sector organizations working on behalf of their local industries to market Canada and Yukon. Yukon's two tourism industry associations - the Yukon Visitor's Association and the Klondike Visitor's Association - co-operate closely with Tourism Yukon, local air carriers, Tourism Canada, Parks Canada and others, to inform potential visitors about Yukon and its tourism industry, with the prime objective of attracting visitors.

TOURISM CONSTRUCTION ACTIVITY

During 1980 and 1981, it is estimated that $10.7 million dollars of construction activity related to tourism occurred in Yukon. In 1982, building permits totalling $3.9 million were issued for tourism related construction, giving a two year total for 1981-82 of $6 million. In 1983, about $3.4 million such permits were issued, yielding a two-year total for 1982-83 of $7,318,000.

The tourism industry derives secondary benefits from much of this construction activity, and, as such, these expenditures do contribute significantly to the health and growth of the industry.

Detailed dollar amounts scheduled to be spent on various types of projects are provided in the exhibit immediately following.

Exhibit Q

Construction Activity Related to the Tourism Industry

(measured in $ thousands)

	Estimated 1980	Estimated 1981	Estimated 1982	Estimated 1983
Accommodation	$ 1,366	$1,029	$ 396	$1,637
Food Services	10	123	214	13
Attraction/Recreation	1,454	681	1,044	992
Retail	4,574	24	885	365
Transportation	1,200	250	1,367	406
Total Amount Expended	$8,604	$2,106	$3,906	$3,412

TOTAL 1980 and 1981	$10,710
TOTAL 1981 and 1982	$6,012,000
TOTAL 1982 and 1983	$7,318,000

Source: Territorial Building permits issued during calendar years 1980, 1981, 1982 and 1983.